

THE CONSCIENCE OF CAPITAL:
PHILANTHROPY AT THE CHAUTAUQUA INSTITUTION

BY

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DISSERTATION

Submitted in partial fulfillment of the requirements
for the degree of Doctor of Philosophy in Anthropology
in the Graduate College of the
University of Illinois at Urbana-Champaign, 2012

Urbana, Illinois

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ABSTRACT

This work seeks to demonstrate that philanthropy at Chautauqua Institution is a way of promoting, designing, preserving and protecting an idealized intellectual, aesthetic, spiritual, and emotional “way of life.” Of central importance is an understanding of how and why donors give and how the Institution shapes and is shaped by its contributors. The Institution promotes an ideology of multi-tiered life-long-learning, credibility, and need; donors respond through volunteering, stewardship, and donations; ultimately benefiting as the members of the collectivity receiving their own gifts. The Institution provides the setting and the donors embed themselves within it through personally identifying with its philosophy, history, and grounds. Donors join with the Institution through participation in its governance and programs, and through philanthropic activities.

My argument/hypothesis is that there is a progression of ideological transference that fuels this philanthropy through time: Institution to donor and donor to Institution. When the Institution provides the appropriate philanthropic goals to Chautauquans; where the ideologies of Chautauquans and the Institution intersect and set each other into production; then decisions to donate are made, and the checks are written. A definitive act of personal engagement with the Institution is confirmed through philanthropic acts.

The challenge of the work then is to explain the underlying conditions, the cultural environment and the mechanisms that generate this process. For that I position my work within critical scholarship focusing on philanthropy and augment that literature through insights gained by applying the work of Mikhail Bakhtin on ideological exchange, the work of Marcel Mauss on gift exchange, and the perspectives of Keith Basso, Akhil Gupta, and James Ferguson on the nature of place.

To my mother Peg Benson, historian Alfreda Irwin and wife Kim Weborg-Benson.

The three people responsible for my life, this work and my happiness.

ACKNOWLEDGEMENTS

I would like to acknowledge the assistance of the many people who have generously given their time toward making this project a reality. My thanks are to the wonderful memory of Chautauqua Historian Alfreda Irwin, without her kind and thorough assistance throughout the research phase of this process; I would not have brought the dissertation to fruition. I especially thank Richard Miller, Daniel Bratton, Tom Becker, David Carnahan and Chris Redmond for their time and the insights they provided into the philanthropic processes at Chautauqua and into Chautauqua itself.

A very special thanks to Janet Dixon Keller who has expanded the definition of patience in allowing me after these many years to return to this work and bring it back to life as a dissertation. Her skill as an editor and advisor led me to many new and important understandings in writing ethnography, developing and applying theory and uncovering crucial details that led to the insights that determined the content of this work. I also wish to thank my dissertation committee Nancy Abelmann, Edward Bruner, and Norman Denzin for their careful reading of the text and guidance through the writing and dissertation defense.

I also think the following individuals for their time during our interviews and to thank them for their hospitality: Loraine Allen, Andy Anderson, Mina and Nancy Arnn, Jack and Kay Bailey, Lynn Ballard, Richard Bechtolt, Robert Bargar, Rindi Barmore, Charles Bestor, Robert Birmingham, Paul Branch, Gilbert Burgeson, David Carnahan, Marylyn Carpenter, Edward Cherry, Jack and Dorothy Clark, George Cornell, James Copeland, Mary Francis Bestor Cram, Andy Dickson, Silvia Faust, Geoff Follansbee, George "Shorty" Follansbee, Ken Fradin, Howard Gibbs, Joe and Toni Goldfarb, Susan Harding, Walter Harf, Charles Heinz, Bill and Dorothy Hill, Paul Irion, Joe Johnson, Barry Joseph, Richard & Marianne Karslake, Mrs. Karslake, Tom

and Irene Kramer, Jack Lesser, Rebecca Lister, Kay Logan, Ross Mackenzie, James Mando, Marty Merkley, Jack Morris, Bess Morrison, Robert Osburn, Norm and Isabel Pederson, Norma Pollock, Miriam Reading, Richard Redington, Harold Reed, Eva Rosenberg, Jeffrey Simpson, Carol Smith, Tom Smith, Cindy Vinciguerra, Jack Voelker, David Williams, Eric and Alisa Wolf, David Zarou, and Robert Zeller. The dissertation would not have been possible without them.

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Chapter 1

Theories and Definitions

Gathering, Each to Give and to Receive . . .

This work seeks to demonstrate that philanthropy at Chautauqua Institution is a way of promoting, designing, preserving and protecting an idealized intellectual, aesthetic, spiritual, and emotional “way of life.” Of central importance is an understanding of how and why donors give and how the Institution shapes and is shaped by its contributors. The Institution promotes an ideology of multi-tiered life-long-learning, credibility, and need; donors respond through volunteering, stewardship, and donations; ultimately benefiting as the members of the collectivity receiving their own gifts. The Institution provides the setting and the donors embed themselves within it through personally identifying with its philosophy, history, and grounds. Donors join with the Institution through participation in its governance and programs, and through philanthropic activities.

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Review: While the literature continues to grow in nonprofit and philanthropic studies addressing philanthropic processes, it is relatively new to anthropology. Nonetheless there are some anthropological contributions with which to ground my own study. While Teresa Odendahl, an anthropologist studying philanthropy and working in the field, told me that there are only a small number of anthropologists concentrating in this area (Odendahl 2003) and a 2010 library data base search has confirmed that this remains true, I summarize and critique in what follows the anthropological approaches to philanthropy and related topics.

Teresa Odendahl's book *Charity Begins at Home: Generosity and Self-Interest among the Philanthropic Elite* opened the door for this study (1990). Through her interviews with over 140 'millionaires' she examined how the wealthy manage power and control over institutions and politics through philanthropy. She describes the philanthropic elites as a specific subculture within branches of old or new money and she explores their variation by gender and age cohorts as well. She offers ideas on restructuring philanthropic activity to make it more publicly accountable in light of its potential to run outside of the democratic process. In line with the contributions of my own research, Odendahl argues that if the channeling of vast sources of wealth is not part of the public debate or the legislative process, and as it has the tendency to be self-serving, "American philanthropy is a system of 'generosity' by which the wealthy exercise social control and help themselves more than they do others" (1990:245).

Francie Ostrower's book focusing on New York City donors *Why the Wealthy Give: The Culture of Elite Philanthropy* examines how the wealthy "take philanthropy . . . and adapt it into an entire way of life that serves as a vehicle for the cultural and social life of their class" (1995: 6). Philanthropy becomes a vehicle for reinforcing cultural status and personal identity through giving to and participating in the organizations that suit their interests both at the cultural level and the level of public service. She makes clear that these elites are well aware that they are not out to solve social problems: that is the government's job and their taxes pay for government. Philanthropy is a means of self-expression differing by creed, gender, social position and age that reverberates with good works and recognition (Ostrower 1995).

George Marcus (1989a, 1989b, 1990) in a series of studies complements the work of Odendahl and Ostrower with a focus on elites and elite institutions. He and Peter Dobkin Hall (1992 & n.d.) have focused on dynastic wealth of families with large estates: the Rockefellers, the Moodys, the Hunts, Getty, the Fords, Carnegie, Mellon, and others in similar standing. These dynasties while being self-sustaining regardless of taxation or regulation are "astonishingly adaptable" (1992:350). The authors sociologically track the rise, evolution, preservation, and influence of families as dynasties. Through time the patrimonial wealth

handed down to descendants is overseen by bureaucracies that manage the fortune in trust with the intent of preserving it from recklessness. Philanthropy is fundamental to this trajectory and the authors' show how these dynasties interface with the world at large through politics and a legacy of culture created via the private philanthropic foundations crucial to the financial management of these dynasties.

The historical study on the philanthropic funding of the 1897-1902 Jesup North Pacific Expedition by Freed, Freed, and Williamson advances this literature with a study of the interaction between the funder and funded and the potential for failure in philanthropic endeavors. It was designed to study the relationship between the peoples of Asia and northwestern North America; it "was a research project of such scientific importance and geographical scope that it still ranks as the foremost expedition in the history of American anthropology" (Freed, Freed, and Williamson 1988:7). The goals of the expedition included gathering ethnographic, material and linguistic data from both sides of the Bering Strait to demonstrate the relationships between the two cultural areas. Morris Jesup, the banker financier of the project, as well as the popular press was concerned with discovering the origins of North American Indians. The article summarizes the complexities and difficulties of running such an enterprise on two continents and handling and cataloging such a volume of materials and information. There were many behind-the-scenes problems that plagued the project. Severe travel and weather difficulties; run-ins with the Russian government over dissident status for the Siberian ethnographers leading to the arrest of one; a measles epidemic; social unrest; coaxing monographs, and personality clashes between Boas and Jesup over funds and the final publication of mountains of data plagued the entire venture. Boas never finished the concluding volume to the expedition which annoyed Jesup in the extreme. Boas eventually left his post in frustration at the American Museum of Natural History where the study was run and moved to Columbia University. It is a demonstration that a philanthropic enterprises, like any other venture, are subject to failures, disagreements, and unfinished results. Jesup was one of the incorporators of the American Museum and its President for 27 years, his fallout with Boaz

struck at his personal stake in the museum and at the investment he had made on its behalf (Freed, Freed, and Williamson 1988).

These anthropological studies discuss status, influence, charity, giving, and exchange but the ethnography is limited. A contextual focus on thick description is needed to further advance theory (Geertz 1973:14). Studies of actual practices of *philanthropic* giving, the nuts and bolts of how an object, event or institution becomes valuable enough to someone so that they invest it with time, energy and money are important to fill out the literature. A few anthropological studies on philanthropy are currently shifting the focus of research to the larger political and economic impacts of philanthropy. Sandra Barnes writes on “strategic philanthropy,” specifically on oil companies directing funds for development in African countries to stabilize production areas to counter terrorism and to protect and expand local markets (Barnes 2005). And outside of the discipline there are numerous studies on the topic that investigate the macro influences of philanthropy as means of redistributing wealth; the uses of philanthropy as a means of social change or manipulation; the use of philanthropy as a means of cultural expression and social class dynamics; and finally a number of micro studies that examine philanthropy within specific cultural settings and within anthropology itself.

My study is situated against the background of these works, especially within the scholarship of Odendahl an anthropologist and Ostrower a sociologist who are concerned with the larger philanthropic access and functions of elites within the context of nonprofit institutions and boards. I add social linguistics, place theory, and Mauss’s seminal work on reciprocity to flush out the details of the philanthropic interactions in one uniquely defined social space. The majority of the studies are descriptions generated from interviews interpreted against statistical and other sociological and ethnographic data. I wanted to enhance these studies through penetrating the surface data with a theoretical model that would thickly describe the personal and institutional motivations and outcomes within this cultural milieu. Chautauqua Institution is much like an island culture because its grounds are surrounded by a six foot fence separating it from the everyday world of others as effectively as the oceans bound islands (Weatherford

1985). The fence and its gate are physical icons for the community symbolizing its integrity and separation. It differs from being a single focus recipient such as Salvation Army post or a symphony orchestra because of a multitude of programming areas in art, music, religion and education plus grounds, facilities, and infrastructure. More so, it has the features of a community over an organization because people can live there. Numerous types of giving to music, art, education, religion, and the physical plant co-mingle. In this respect Chautauqua is much like the “big man” political systems in Melanesia (Lindenbaum 1979; Lindstrom 1981; Sahlins 1963). Chautauquas can achieve status through their works, their philanthropic gifts, and through their service to the Institution on boards, committees, and clubs. The more they do, the more recognition they attain and should their family have deep roots in the Institution their status means even more. The present work is an example of bringing anthropological insights generated from studying nonwestern communities to bear on Western society (Mead 1928, 1954). J. McIver Weatherford’s “Tribes on the Hill: The U.S. Congress Rituals and Realities” emphasizes repetitive themes on the exercise of power throughout human history that play out equally in the mountains of New Guinea as well as on Capitol Hill (Weatherford 1985). In my own research I find such comparisons similarly insightful.

Justification

Anthropology has generally focused on the disempowered: tribal societies, the urban and rural poor, and agrarian societies. Societies that could not, at least until relatively recently, muster the political power or the financial strength to deny anthropologists access Hanson 1989.² This study is a reversal of this trend.

To contextualize my research within the intellectual history of anthropology I reflect on some key ideas before launching into the study itself. Laura Nader in 1972 advocated “studying up,” gaining ethnographic access to those who have and who exercise power. This move is a responsibility of anthropology she argues for us as scholars must contribute to the understanding of the world’s elite as well as the disempowered if we are to influence change. There is very

little "first-hand work" by anthropologists on the upper classes. She argues it is crucial that in a democracy, citizens understand those who shape attitudes, who actually influence and govern institutions. There is a network of power which is not written about in annual reports, statistical studies, and biographies. Anthropologists need to describe the unwritten customary behaviors of the affluent (Nader 1972) to gain understanding of social dynamics. Noam Chomsky argues that "It is the responsibility of intellectuals to speak the truth and expose lies" and that by understanding the mechanisms of "ideological control" we can effectively learn how to counter them (Chomsky 1967: 1; 1986:276-286). As the top percentage of the population gains more control over the economies of the world and the schism between rich and poor continues to widen (Anup Shah, Poverty Facts and Stats: 2010 <http://www.globalissues.org/article/26/poverty-facts-and-stats>); understanding how the affluent exercise power can be applied to understanding the mechanics of how wealth is generated and maintained through philanthropy (Krugman 2002).

Peter Dobkin Hall, a co-author with George Marcus and one of the leading scholars in philanthropic studies states:

Despite the burgeoning of research on philanthropy in the past decade, almost nothing has been written on its connections to the wealthy individuals who made it possible. . . . Almost without exception, American scholars have worked within the institutional framework created and supported by private philanthropy. Examining and questioning the framework itself has been seriously avoided. [Hall 1992]

Sociologist Christopher Jencks joins Nader and Hall in pointing out that studies in the nonprofit sector are lacking in the area of ethnography. Jencks acknowledges that the research on economic determinants such as tax deductions and effects on income have been useful, but we are lacking in "hard data" on the culture of donors (Jencks 1987:321-339). There is a gap in the literature and in research on real life situations that discloses the conditions and incentives of those who support nonprofit organizations. "In fact, sociologists have hardly studied philanthropic giving at all, and psychologists, although interested in many forms of altruism,

have not studied people who give away their money in real-life situations" (Jencks 1987:326). The same is true for anthropology. Ethnographic research is needed to focus on the effects donors have on nonprofit organizations and the cultural dynamics of those effects: self-interest and gratification, status motivations, personal rewards, ethics, values, norms, even personality, must be explored to reveal the texture of philanthropy. Jencks calls for inquiry into the phenomena from at least seven vantage points: age, gender, ethnicity, religion, education, community ties, and family background. I found a great deal of material on these topics through participant observation, interviews, and archival research. Informants provided the qualitative information through interviews and the material from the archive situates the behavior historically. I was in a position to follow the 1990-1995 'Chautauqua Challenge,' a \$22.5 million campaign, through its processes of solicitation, implementation, and astounding success. In 1995 the campaign closed \$1.6 million dollars over its goal (Chautauqua Challenge Campaign Final Report, Chautauqua Publication, 1995).

So how do those with power in a powerful Western nation use it, and what are the processes at work as they realize their goals (Nader 1972; Rose 1990, 1991, 1995; Womack 1995)? How do those with surplus incomes manipulate their environments? Can we make generalizations concerning people's motivations to add to, detract from, shape, and build their ideas into their environments? How are people enculturated with ideas, perspectives, emotions, aesthetics and morals such that they use their financial resources to manipulate their worlds? What fuels this giving? What is sought in return?

In summary, wealth and power are understudied in anthropology. Philanthropy as a form of exchange is understudied in anthropology. Chautauqua is a sharply defined cultural entity relying heavily on philanthropy. It is a complex community where giving is critical to

institutional continuity and members participation. A thick description of Chautauqua's events and actors can advance theory in anthropology and the interdisciplinary field of the study of philanthropy.

Theorists

My task here is to account for how and why the philanthropic interactions of Chautauquans result in an abundance of giving to the Institution. The Institution and Chautauquans richly cross pollinate each other and reveal the most when thickly described, illuminating interactions and interdependencies (Geertz 1973:6-7, 9-10). The combination of the theoretical perspectives of Marcel Mauss, Mikhail Bakhtin, and Keith Basso provide a framework appropriate for this ethnography. I begin with a critical review of Mauss' theory on gift exchange to situate Chautauquan philanthropy within a comprehensive theory of reciprocity. To describe the complex nature of the ideological exchange, I turn to Mikhail Bakhtin to illustrate the ideological mechanisms that precede material exchanges and are reinforced by those material dynamics. And for answer as to why Chautauquans ground themselves so thoroughly at Chautauqua itself; I use the work of Keith Basso on the culture of place, to put the ethnographic flesh on its economic and ideological bones.

Processes and Mechanisms: Mauss, Basso, and Bakhtin

Gathering, Each to Give and to Receive . . .

Chautauqua Brochure 1993b

Marcel Mauss

Philanthropy is a form of gift exchange. At its simplest, it is the giving of either labor or commodity to further some objective; cultural or material. From anthropologists, and especially Mauss, I seek a basic set of ideas to demarcate philanthropic giving from other cultural

processes. Marcel Mauss is the starting point; his book “The Gift” is among the first anthropological texts on gifts and reciprocity provides the first set of ideas I use to study philanthropy at Chautauqua.

Mauss’s text focuses on “primitive societies as well as those we might characterize as archaic,” societies where “all kinds of institutions are given expression at one and the same time -- religious, juridical, and moral, which relate to both politics and the family; likewise economic ones, which suppose special forms of production and consumption, or rather, of performing total services and of distribution” (translation 1990:3). Mauss sees gift exchange as a fundamental process where of:

all these very complex themes and the multiplicity of social ‘things’ that are in a state of flux, we seek here to study only one characteristic – one that goes deep but is isolated: the so to speak voluntary character of these total services, apparently free and disinterested but nevertheless constrained and self-interested. Almost always such services have taken the form of the gift, the present generously given even when, in the gesture accompanying the transaction, there is only a polite fiction, formalism, and social deceit, and when really there is obligation and economic self-interest. . . . *What rule of legality and self-interest, in societies of a backward or archaic type, compels the gift that has been received to be obligatorily reciprocated? What power resides in the object given that causes its recipient to pay it back?* [Mauss 1990:3 emphasis in original]

For the purposes here, I move beyond Mauss’ focus on archaic societies to test the relevance of his perspective more broadly. In this I retain interest in the multifaceted nature of reciprocal gift giving. I carry forward into my research the question Mary Douglas’ poses in her introduction to the 1990 edition of “The Gift”: “Where does the system get its energy” (1990:ix). Maurice Godelier captures the dynamic on which my research rests in his summary of the gift giving process as: “actually a concatenation of three obligations: giving, receiving (i.e. accepting), and making a return gift once one has accepted” (1996 [1999]:6).

Mauss seeks to explain the gift giving process as fundamental to societies, groups and the morality of individuals. It is a cohesive practice shaping economic and cultural responsibilities, exchanges, interests, and obligations (1990:2, 73, 75-76, 78). For Mauss:

All of these phenomena are at the same time juridical, economic, religious, and even aesthetic and morphological, etc. They are juridical because they concern private and public law, and a morality that is organized and diffused throughout society; they are strictly obligatory or merely an occasion for praise or blame; they are political and domestic at the same time, relating to social classes as well as clans and families. They are religious in the strict sense, concerning magic, animism, and a diffused religious mentality. They are economic. The idea of value, utility, self-interest, luxury, wealth, the acquisition and accumulation of goods – all these on the one hand – and on the other, that of consumption, even that of deliberate spending for its own sake, purely sumptuary: all these phenomena are present everywhere [1990:79]

Mauss partially wrote in response to the Russian Revolution and incipient free market practices. Mauss asserts that the ideas founding free market theories in many regards ignore human nature. What drives human beings, he argues, is a desire to maximize pleasures, comforts, and material possessions and that all significant human interactions cannot thus be analyzed in market terms. Anthropologists describe economies based on the exchange of gifts. These take very different forms, from potlatch ceremonies where chiefs tried to best each other at destroying property, to tribal economies based on reciprocity. David Greaber concludes that for Mauss:

What really matters is the relations between the people; exchange is about creating friendships, or working out rivalries, or obligations, and only incidentally about moving around valuable goods. As a result everything becomes personally charged, even property. In gift economies, the most famous objects of wealth - heirloom necklaces, weapons, feather cloaks – always seem to develop personalities of their own. [Greaber n.d.:<http://www.freewords.org/greaber.html>]

Mauss opened the door to thinking about the economics of gift exchange in new ways. Gifts take on personal meaning, become significant symbols in their own right, and carry with them patterns of culture that can be studied and assessed in relation to wider social institutions and behaviors.

Ilana Silber makes the connection between Mauss and philanthropy. She finds in his three-fold model of giving, accepting, and returning, a “deep intermingling of the donor’s identity with the gift transferred . . . the related capacity of the gift to create, consolidate, or

otherwise modulate a personal relationship between donor and donee” (1998:138).

The connection between the gift and a donor’s personality, identity, and self-definition may be important to understanding how gift giving and philanthropy link Mauss directly to Mikhail Bakhtin’s ideas on ideological exchange described below. Silber states: “that American philanthropists . . . often prefer to emphasize the rewarding effects of giving, such as the power to shape their environment as they see fit, or a whole set of subjective, psychological ‘good feelings’, such as pleasure, self-fulfillment, self-esteem, etc.” (1998:141). The interaction of ideologies Bakhtin posits provides the contextual structure for the ideas of Mauss’ gift exchange to play themselves out. Silber:

While modern giving is characterized by a much stronger element of individual choice, and by a much greater range of options as to what to give and to whom, than could possibly be contained by Mauss’ law of triple obligations, this also means that a much heightened importance is given to personal taste, commitment, and involvement with the choice and management of one’s giving. Far from becoming detached from the gift, the identity of the donor does seem to leave its imprint and remain attached to the gift, which in fact becomes a vehicle for that identity and a mechanism for its self-definition and expression. [1998:142-143]

Mauss addresses exchange between archaic groups and in the modern context Silber recognizes the personalized influence of giving among individuals. As Francie Ostrower notes, people like to give in situations where their gifts are acknowledged by others (1995:14). The influence of religion, ethnicity, and class will sway a donor’s interests and identity. The dynamic energy of archaic giving described by Mauss is a foundation for investigating modern philanthropic giving. The question of how philanthropic giving may blend economics, law, aesthetics, morals, and religious dimensions is one I will address in what follows. What are the dynamics of a gift to a church that is a personally delineated and identity ridden identifier that is tax deductible, socially recognized, *and* morally and spiritually uplifting?

In this dissertation I seek to explore whether modern philanthropic exchanges, like gift

exchange in archaic societies contribute through ritual activities such as dedication ceremonies, dinners, festivals, galas, reunions and concerts to what Mauss called an intensified sense of social effervescence. Are philanthropic activities able, again as in more archaic contexts, to define, confirm or modify prestige and status distinctions, or to nurture some form of relationship between otherwise disconnected social groups (Silber 1998:144). A part of the hypothesis I develop is that philanthropic exchange elevates ideological exchange to the pragmatic ends of social interchange and identity building while creating and sustaining a personal and public persona. Can people calculate “what’s in it for them” when they give; and if so, how? Silber actually asks that a fourth phase be added to Mauss’ threefold model: “beyond giving, receiving, and returning, is the act of asking or soliciting philanthropic giving. . . . Studying transformation in what counts as legitimate and efficient techniques of fund raising would no doubt help understand much about the nature and place of giving in contemporary settings” (1998:145).

This generates the question of how does the *giving—receiving—returning—soliciting* process penetrates the ideological boundaries between Chautauqua and Chautauquans? This extended Maussian model predicts a more encompassing pattern of exchange to be explored. What is so valuable about Chautauqua that makes it so important to its donors? Keith Basso and others build the bridge between why a place is important, to understanding the processes of ideological transfer at work between people and the sites of their giving.

The Anthropology of Place

Gupta and Ferguson acknowledge that part of the relatively recent crisis in anthropology is related to challenges to dominant conceptions of culture, power, and place; but it is also a period of enormous possibilities for ethnography. Place depicts a certain geographical location, but in

an increasingly globalizing and mass mediated world, an isolationist view of place is eroding (1997:25-26). They ask: “How are understandings of locality, community and region formed and lived” (1997:6). Keith Basso offers a localized version of place, while Crain, Gupta, Ferguson and Peters offer a view on how the local is being infused by the global.

“It’s the Place that Never Leaves You”

Chautauqua Pamphlet 1990

What do people make of places? The question is as old as people and places themselves, as old as human attachments to portions of the earth. As old, perhaps, as the idea of home, of “our territory” as opposed to “their territory,” of entire regions and local landscapes where groups of men and women have invested themselves (their thoughts, their values, their collective sensibilities) and to which they feel they belong. The question is as old as a strong sense of place--and the answer, if there is one, is every bit as complex. [Basso 1996:xiii]

Being able to isolate a specific geographical place is a critical variable in this study allowing me to tighten my focus on the factors generating the philanthropic behavior. Do Chautauquans feel that they inhabit a landscape that symbolically resonates with culture and history (Basso 1996:xiii-xiv)?

Basso’s seminal work on the Western Apache titled “Wisdom Sits in Places” became my handbook. He describes how people think about occupying landscapes, how they form personal relationships with geographic features and how these features hold symbolic importance for them. The Apache he worked with use place and place names for interpreting personal and social actions and histories. They know what is actually and symbolically there, why the constituent parts of places are important, and how the landscape affects their lives (1996:74-75).

Because of their inseparable connection to specific localities, place names may be used to summon forth an enormous range of mental and emotional associations – associations of time and space, of history and events, of persons and social activities, of oneself and stages in one’s life. And in their capacity to evoke, in their compact power to muster and consolidate so much of what a landscape may be taken to represent in both personal and cultural terms, place-names acquire a

functional value that easily matches their utility as instruments of reference.
[1996:76-77]

Language provides the evidence; symbols are “detached from their fixed physical moorings and transformed into instruments of thought and vehicles of purposeful behavior” (1996:75). Places come to represent symbolic systems. *Toponyms* or place names have the power to evoke associations of time, place, history, events, values, persons, and social activities of the group, of the life cycle, or of oneself. Place names can have the compact power to muster and consolidate what the landscape represents. Gettysburg represents the turning point of the U.S. Civil War; Woodstock symbolizes the counter culture revolution of the 1960s; Yosemite represents unspoiled natural beauty. I have places on my property than when I go by them I am reminded of someone or something. There is a set of roots I mow over in my backyard that always remind of a lifelong friend. Go figure. Values, standards, and ideals are reflected in the symbols represented by a place as in the places themselves. The connection to the land becomes a charter for being in the world.

Landscapes are available in symbolic terms as well, and so, chiefly through the manifold agencies of speech, they can be “detached” from their fixed spatial moorings and transformed into instruments of thought and vehicles of purposive behavior. Thus transformed, landscapes and the places that fill them become tools for the imagination, expressive means for accomplishing verbal deeds, and also, of course, eminently portable possessions to which individuals can maintain deep and abiding attachments, regardless of where they travel. [Basso 1996:75]

Just the name of a place or a photo can evoke a myriad of memories and emotions. Places can become a symbolic repository for memories of important events that take place in people’s lives. Places can represent good or bad times, defeat or victory, religious exultation or crises.

I hypothesize that Chautauqua is an example of how people inhabit and are inhabited by a landscape in a continuous reciprocal relationship (Basso 1996:102). In this dissertation I explore

the possibility of a reciprocal relationship uniting people and Chautauqua through the investment of meaning into the most fundamental of experiences. Basso describes how the Western Apache think and act “with” their landscapes, “to weave them with spoken words into the very foundations of social life” (Basso 1996:75). What details the process of this happening at Chautauqua? How and how much does place infiltrate the interactions of Chautauquans to make it such an indelible experience?

Geography becomes metaphor, drawing out cultural meanings and communicating about the relationship between the people and the place. Gupta and Ferguson call these “cultural territorializations (like ethnic and national ones) [that] must be understood as complex and contingent results of ongoing and political processes” (1997:4). Basso asserts that the same processes are at work for creating cultural meanings in any venue. Values, standards, and ideals are reflected in the symbols of the landscape and are used as further means of interpreting life.

Places can generate spontaneous reflection and resonate with felt-sentiment. “It is at times such as these, when individuals step back from the flow of everyday experience and attend self-consciously to places – when, we may say, they pause to actively sense them – that their relationship to geographic spaces are most richly lived and felt” (Basso 1996:107). The understanding of a place is the product of the engaged experiencer. “Selfhood and placehood are completely intertwined. Having developed apace together, are positive expressions of each other, opposite sides of the same rare coin, and their power to ‘bind and fasten fast’ is nothing short of enormous” (Basso 1996:146). Basso describes how an extended interaction with a particular landscape becomes an incorporating mechanism of mental and social development. Names and narratives recall mythically important resources to reflect upon when making interpretations that influence decisions and thinking that can alter who they are. “They show by

their actions that their surrounds live in them” (Basso 1996:146). There is a moral reality that is passed onto succeeding generations that employ the landscape as an encyclopedic narrative to be interiorized and used to act wisely and successfully in Apache life.

Weaving biography and place triggers self-reflection. Who am I? Who did I used to be? Who might I become? And the stories of the Apaches Basso learned from illustrate the profound reflections spurred by place over individuals’ life times. Chautauquans, however, have a short window of opportunity for reflection *in place* because the nine-week summer season is short and most guests stay only a few days to a week. Yet they are supposed to reflect here, it is part of the dogma. In this dissertation I interrogate the process of reflecting *in place* for Chautauquans while also asking how Chautauqua stays with residents for the long months when they are away. As Basso argues:

Place-based thoughts about the self-lead commonly to thoughts of other things—other places, other people, other times, whole networks of associations that ramify unaccountably within the expanding spheres of awareness that they themselves engender. The experience of sensing places, then, is thus both thoroughly reciprocal and incorrigibly dynamic. As places animate the ideas and feelings of persons who attend to them, these same ideas and feelings animate the places on which attention has been bestowed, and the movements of this process—inward toward facets of the self, outward toward aspects of the external world, alternately both together—cannot be known in advance. When places are actively sensed, the physical landscape becomes wedded to the landscape of the mind, to the roving imagination, and where the latter may lead is anybody’s guess. [Basso 1996:107]

Basso cites Jean-Paul Sartre who describes the eventual inability to distinguish the object’s meaning from the act of perception. Qualities become so deeply embedded by the perceiver in the space that it becomes impossible to make distinctions between what is felt and what is perceived. “Thus, through a vigorous conflation of attentive subject and geographical object, places come to generate their own fields of meaning” (Basso 1996:108). People suture meaning

into the landscapes that they themselves import, tap, and absorb. They infuse places with import and then work the symbolism into the multiple contexts with which they interact.

As natural “reflector” that returns awareness to the source from which it springs, places also provide points from which to look out on life, to grasp one’s position in the order of things, to contemplate events from somewhere in particular. . . . Relationships to places may also find expression through the agencies of myth, prayer, music, dance, art, architecture, and in many communities, recurrent forms of religious and political ritual. Thus represented and enacted daily, monthly, seasonally, annually—places and their meanings are continually woven into the fabric of social life, anchoring it to features of the landscape and blanketing it with layers of significance that few can fail to appreciate. [Basso 1996:109-110]

Place is important because Chautauqua is a site of consumption that requires a duality of living. People purposely come here from all over the United States and Canada versus being born and raised here. This generates what John Durham Peters calls a condition “of “bi-focality” in which actors simultaneously experience the local and global, possessing both “near-sight” and “far-sight” (1997:75). While they value an in-depth familiarity with Chautauqua they inevitably bring with them a wider understanding of the world from of mass media culture. How the Institution’s landscape takes on an exaggerated and enhanced quality that elevates it to a higher level of reverence and admiration is important to know. But we also have to consider how the mass-mediated global world infringes on the Chautauqua experience (Crain 1997:291). The gate surrounding the Institution keeps the world out while the lecture series at the amphitheater hosts speakers whose topics bring the world’s discourses within the fence. I ask how Chautauquans may appreciate their locale and yet embrace the “far” from the “near” as well.

Without giving up anthropology’s traditional attention to a particular people and place Ferguson and Gupta advocate “creatively eclectic methodological strategies” for the study of local communities and their relationships to the larger world (1997:25-26). It is ethnography in the post crises anthropology. The mechanisms that drive this engine are wide ranging, flexible

and span a wide range of cultural, linguistic, psychological and cognitive territory. I use the insights of Mikhail Bakhtin to establish a set of interpretive mechanisms that help navigate the complexities of research at Chautauqua.

Bakhtin

Mikhail Bakhtin was a Russian philosophical anthropologist, literary critic, and linguist who worked on literary theory and the philosophy of language. His work plays a primary role in my thinking about culture, language, identity, and philanthropy. I have found his philosophy so thorough, so full of life, so relentlessly intricate and so accurate in its details and observations; that he became indispensable to this dissertation. In another version, his work might have been sufficient to describe the philanthropic interactions at Chautauqua without the assistance of other theorists.

Bakhtin is fundamental to designing research on exchange at Chautauqua (1981, 1984, 1986, and 1990). I use his descriptions of the heteroglossic nature of speech and literature and cultural interactions (1981:262-263; 1986); and his exceptional descriptions of ideological exchange and the processes of cultural flow and transference to guide my research and the development of the arguments it entails (1981, 1984, 1986).

Bakhtin came to see social contexts as composed of a rich variety of points of view and speech genres (professional, legal, street, etc.) of particular individuals and/or particular groups (1981:262-263; 1986:61). This diversity of viewpoints and the nearly infinite combination of ideas, words, and utterances available to people are what he calls *heteroglossia*.

But no living word relates to its object in a *singular* way: between the word and its object, between the word and the speaking subject, there exists an elastic environment of other, alien words about the same object, the same theme, and this is an environment that is often difficult to penetrate. It is precisely in the process of living interaction within this specific environment that the word may be individualized and given stylistic shape. [Bakhtin 1981:276]

The exciting tension, the anticipation, the expectation, the appropriation, and the sense of participation are what Bakhtin finds (to greater or lesser degrees) to be dynamic fuel for shaping identity and the verbal ideological life of social interaction. There are a great range of possible interactions. Heteroglossia is governed by two competing forces: *centripetal* forces that are the centralizing conservative forces serving to unify a verbal-ideological world; and the opposing *centrifugal* forces that decentralize and disperse meanings challenging the consolidation of ideas (1981:270-271).

Centripetal forces are continuously unifying and creating stability, defending the language from the “pressure of growing heteroglossia” (1981:271).

We are taking language not as a system of abstract grammatical categories, but rather language conceived as ideologically saturated, language as a world view, even as a concrete opinion, insuring a *maximum* of mutual understanding in all spheres of ideological life. Thus a unitary language gives expression to forces working toward concrete verbal and ideological unification and centralization, which develop in vital connection with processes of sociopolitical and cultural centralization. [Bakhtin 1981:271 emphasis in original]

This linguistic and cultural unity is under constant assault by the dynamics of centrifugal forces that contain the social and historical forces of change. The average person becomes so saturated with their language and culture that they are largely unaware of these interactions. Bakhtin places a microscope on the process:

Indeed any concrete discourse (utterance) finds the object at which it was directed already as it were overlain with qualifications. Open to dispute, charged with value, already enveloped in an obscuring mist—or, on the contrary, by the “light” of alien words that have already been spoken about it. It is entangled, shot through with shared thoughts, points of view, alien value judgments and accents. The word, directed toward its object, enters a dialogically agitated and tension-filled environment of alien words, value judgments and accents, weaves in and out of complex interrelationships, merges with some, recoils from others, intersects with yet a third group: and all this may crucially shape discourse, may leave a trace in all its semantic layers, may complicate its expression and influence its entire stylistic profile. [Bakhtin 1981:276]

Surrounded by a multitude of possible meanings, people choose through a cultural juxtaposing process (what's important, residual, “right”/ “wrong”, etc.), a set of meanings from a particular context that best interprets the situation from their vantage point in that moment. People inhabit an individual cultural space where by the default of being social beings, they are responsible for communicating to others their point of view. This takes place in any linguistic exchange between people. Michael Holquist calls this process *dialogism* (Holquist 1990:14-17, 84). This personalized environment is the site of the struggle between unifying properties of language and dispersing forces of events. Language's centripetal effect reduces the number of choices from the index of possible interpretations into a manageable set of understandable ideas and relationships. “What happens in an utterance, no matter how commonplace, is always more ordered than what happens outside an utterance” (ibid:84).

Where meanings intersect, dialogic *relationships* occur between people and join together the interpretive contexts for individuals to communicate within. “Highly specific dialogic relationships; no matter how these languages are conceived, all may be taken as particular points of view on the world” (Bakhtin 1981: 293). These narrative relationships in turn, define and explain the significance of the social context for the speakers and listeners (Bakhtin 1981:271-272, 289, 428; Holquist 1990:15, 69, 84-85). Creating social structures as they go, self and other exchange information, drawing from their wide range of personal materials in a particular place and time.

For example, a high school student asks a teacher for clarification on the answer to a geometry problem. The context is defined by the two individuals in a classroom, highly proscribed behavior follows where their respective points of view generated out of a teaching and learning exchange, create a specifically classroom oriented interactive process. The student understands and trusts that the teacher knows the material out of the vast stores of mathematical knowledge they have learned in college and have practiced teaching. The teacher understands the student's question, maybe knows the student somewhat from previous questions or conversations and tailors the answer to fit that student precisely. No surprises. But the

underlying dialogic relationships are heavily loaded with possibilities that are sorted out and inscribed by contextual points of view. There are centrifugal and centripetal processes exerting and conserving the “dialogically agitated” environment that is taking shape and meaning in a particular historical moment that “cannot fail to brush up against thousands of living dialogic threads” (Bakhtin 1981:276 in Bruner and Gorfain 1984:57).³

The teacher and student both have complex biographies that they bring to the interaction. The student may be experiencing problems at home, perhaps her father is out of work and there is discord between her parents. She may feel out of sorts just being 15 with the myriad of social complexities and challenges that come with being a teenager. Throw in a fight with her best friend who is present and snickers at her question and the pot is sufficiently stirred. The teacher may like this particular student and recognizes the snicker and what it could mean to her fragile ego. He may have just got a raise, have a new car in the lot, and have a baby on the way. But his father is dying and he is worried about his aging mother. This student reminds him of his mother bringing these thoughts to the forefront during this particular question and answer session. The 100 words they exchange are classroom discourse “overlain with qualifications charged with value . . . entangled and shot through with shared [and unshared] points of view”, etc., because of the nature of interactions as Bakhtin describes them. She gets her question answered, but the larger context is always more than it appears. “We discharge our responsibility by putting meaningless chaos into meaningful patterns through the authorial enterprise of translating “life” outside language into patterns afforded by words, by sentences—and above all, by narratives of various kinds” (Holquist 1990:84).

Holland, Skinner, Lachicotte and Cain emphasize the cumulative product of these myriad experiences as *identity* (1998:3-4, 4-9) and the process is one they call “authoring the self.” This identity formation is a cultural production “or interlocking genesis, that is actually a co-development of identities, discourses, embodiments, and imagined worlds that inform each moment of joint production and are themselves transformed by that moment.”⁴ The rich dialogic process occurring over a lifetime creates new ways of being through a being that is “malleable,

changeable and subject to discursive powers” (1998:5, 169). Active identities are forever forming or being *authored* by the self (1998 172-174; Holquist 1990:84).

I transpose Bakhtin’s use of the term ‘word’ with ideology because of the flexibility he gives to the term ‘word’. Bakhtin sees the ‘word’ as a charged and living thing loaded with potential and transformative properties. It is not a single isolated signifier. He interchanges the term ‘word’ with discourse in many instances, a move grounded in his discussions of idea exchange.

An individual’s personal ideological conception lies on the border between oneself and the other. The word in language is half someone else’s. It becomes “one’s own” only when the speaker populates it with his own intention, his own accent, when he appropriates the word adapting it to his own semantic and expressive intention. Prior to this moment of appropriation, the word does not exist in a neutral and impersonal language (it is not, after all, out of a dictionary that the speaker gets his words!) but rather it exists in other people’s mouths, in other people’s contexts, serving other people’s intentions; it is from there that one must take the word and make it one’s own. [1981:293-294]

The transmission and assessment of the speech of others, the discourse of another, is one of the most widespread and fundamental topics of human speech. In all areas of life and ideological activity, our speech is filled to overflowing with other people’s words, which are transmitted with highly varied degrees of accuracy and impartiality. The more intensive, differentiated and highly developed the social life of a speaking collective, the greater is the importance attaching, among other possible subjects of talk, to another’s word, another utterance, since another’s word will be the subject of passionate communication, an object of interpretation, discussion, evaluation, rebuttal, support, further development and so on. [1981:337]

Bakhtin argues that new ideas and perspectives are born out of the similarities and differences between us and others. In the chronotopic (time-space matrix) terrain of ideological discourse (in the broad sense of idea exchange), the listener is at a boundary between her inner monologues (inner thoughts) and others’ ideas (1986:61-62). The speaker’s words awaken new possibilities for meaning in a dynamic process where new understandings are generated through inter-animating relationships between speaker and listener. The process is an interaction among

people's competing meanings that opens new semantic domains. "Discourse is able to reveal ever new ways *to mean*" (Bakhtin 1981:282, 1986:72, 75, 77; emphasis in original, 1981:345-346; Hill 1986:92). While creatively engaged in this fast dialogic process, the listener attempts to guess, to imagine, how the other's ideas will be played out from her own point of view. In doing so, the listener incorporates part of the speaker's ideas into their own inner monologues, making them her own. The listener becomes composed of many points of view which "sooner or later liberate themselves from the authority of the other's discourse" by making the others ideas her own (Bakhtin 1981:348; 1984:78-92). The other's idea as presented is questioned, teased, objectified and put into new cognitive contexts in order to expose weaknesses, "to get a feel for its boundaries" (Bakhtin 1981:348). This dialogic process is an endless, powerful and vigorous re-processing of another's words and utterances that enriches and fuels creative understanding.

The importance of struggling with another's discourse, its influence in the history of an individual's coming to ideological consciousness is enormous. One's own discourse and one's own voice, although born of another or dynamically stimulated by another, will sooner or later begin to liberate themselves from the authority of the other's discourse. This process is made more complex by the fact that a variety of alien voices enter into the struggle for influence within an individual's consciousness (just as they struggle with each other in surrounding social reality). [Bakhtin 1981:348]

The *response* of individuals is what is interesting here. The ideologies of individuals play off each other in dialogic relationships that generate *new* understandings. This action fuels the freshness of the experience by providing vitally rewarding ways to encounter new contexts.

The fact is that when the listener perceives and understands the meaning (the language meaning) of speech, he simultaneously takes an active, responsive attitude toward it. He either agrees or disagrees with it (completely or partially), augments it, applies it, prepares for its execution, and so on. And the listener adopts this *responsive attitude* for the entire duration of the process of listening and understanding, from the very beginning—sometimes literally from the speaker's first word. Any understanding of live speech, a live utterance, is *inherently responsive*, although the degree of this activity varies extremely. Any understanding is imbued with response and necessarily elicits it in one form or another: the listener become the speaker. [emphasis added Bakhtin 1986:68]

As language centripetally coalesces through time into a consistent discursive speech genre, it takes on the power to penetrate and mix with an individual's ideology or inner discourse (1986:60, 79-81). Bakhtin calls this an *authoritative discourse* or an *internally persuasive discourse* (1981:272, 282). Once a person's or an institution's discourse persuades with sufficient force to be internalized, it has gained authority and power, and will create a niche in the overall discourse of a community; and if consistent over time, within the history of that place. The longer one interacts, the more people assimilate the new discourse, the more consistent the speech genre and ideology of the community becomes. As this new discourse blends with an individual's personal history, it gives expression to the forces at work, to become the speaker, to physically manifest ideology (Bakhtin 1981:271; 1986:68).

A fundamental axiom of this system is that the ideological domains are different. The fact that they are dissimilar, *slightly askew*, holds the key to the stylization of interactions. Bakhtin states that no two people's ideological domains or points of view can ever be identical: the "possibilities of human activity are inexhaustible" (Bakhtin:1986:60). There is too much diversity, historical shift (even from one moment to the next), and difference of experience for any single idea to be a copy of another. It is the constant knitting together of new orientations, the interweaving, the polemic invasion of ideas, and the penetration of the information that "activates and organizes" linguistic and socio-political exchanges, *ad infinitum*. Bakhtin estimates that "no less than half" of everyday speech is citations from or references to another's speech (1981:339). The products of the dialogic interactions represent new hybrids that are a mixture of the fresh intentions and newly born subsets of the founding orientations (Bakhtin 1981:282, 283). "Understanding comes to fruition only in the response. Understanding and

response are dialectically merged and mutually condition each other; one is impossible without the other” (Bakhtin 1981:282).

Where ideologies meet and the two are “tightly interwoven with each other, becoming almost indistinguishable . . .” nurturing something that has come to be an internal ideological possession; the response becomes a personal component and property of the individual. Once internally absorbed and dialogically digested, it is only a matter of course that one takes care of one’s valued possessions. Ideological ownership, once solidified, is the transfer point from outsider to insider, from performer to audience, from other to self. It is the “socio-verbal ensnaring [of] the object” that over the long or short term makes an individual a member of an ideological domain. The differences are recycled and the new belief and evaluative system stuns and destroys the subject/object distinctions (Bakhtin 1981:283; Holland et al. 1998:184).

To reiterate, my primary hypothesis is that there is a progressive spiral of ideological transference that fuels successful philanthropy through time: Institution to donor and donor to Institution. The dissertation is an investigation and an exploration of the interanimation and dialogic processes at work at Chautauqua to create this transference through ideas and symbols that materialize in the real world. At Chautauqua donors literally invest themselves in the Institution and infuse themselves into its landscape – the mechanism for so doing is philanthropy. The Maussian notion of reciprocity provides the frame for understanding the complexity of cultural exchanges in gift giving and receiving. Basso’s interactivity between people and places elucidates the complexity of bonding with an environment to the point of personalizing geography via symbolism and meaning. Gupta and Ferguson add the dynamic reference to a global/local exchange that allows Chautauquans in particular to bring themselves within fenced grounds without losing the impact of their identities in the world. Synthesizing

Bakhtin's mechanisms for ideological exchange between people and institutions with the theories of reciprocity and place elaborated here represents a three tiered framework for investigating the how philanthropy works at Chautauqua. The act of exchange, the environment in which it takes place, and the mechanism by which ideas are imbibed and possessed generate my main hypothesis and subsidiary questions providing the directives to investigate how this all works.

Methods:

I based my fieldwork data gathering on a three pronged approach of a). interviews with Chautauqua residents and staff, b). participant observation of events at Chautauqua and social and administrative interactions, and c). archival research in the Chautauqua library (Bernard 1988, Denzin 1989a, 1989b, Douglas 1985, Geertz 1973, J. Hall 1990, P. Hall 1992, Hill 1993). I conducted over one hundred interviews soliciting stories of personal history with the institution, family, gender, education, and religion. These elements of residents' lives constitute the cultural foundations of Chautauqua. Of the interviews with residents, I chose representatives of the "Old Time Chautauquans," administrators, campaign volunteers, long and short term visitors, property owners and renters, young and old, and both Jews and Christians to represent a diversity of perspectives on identity, ideology, value, and place.

All but one of my interviews were friendly and cordial. I was told by more than one interviewee that they learned more about their own perceptions of Chautauqua from their conversation with me. Following Jack Douglas' method of open ended interviewing, much of the dialogue was conversational and relatively spontaneous (Douglas 1985). I tailored my interviews to fit the situation and the individual.

I began with open ended interviews that were conversational in nature. I was more concerned with rapport than with a rigorous set of questions. I tape recorded each interview and took copious notes. I had five sets of people I made sure to interview: a). the Administrative staff, b). members of the Board of Trustees, c). members of the Foundation Board, d). campaign volunteers, and e). individual Chautauquans who had made contributions to the Institution. Many members of the last four categories overlapped. After developing an understanding of how the Chautauqua Challenge campaign was designed, how the Institution's needs were established, the logistics of how this campaign was implemented, and how people were targeted, I began interviewing Chautauquans. The Chautauqua Season is only nine weeks long. I strove to conduct as many interviews as possible during that time. Some key individuals were interviewed twice. In the off-season I attended an Institution Board of Trustees meeting and the following summer a meeting of the trustees of the Chautauqua Foundation and a Volunteer luncheon.

In retrospect there were many opportunities missed. I did not press for attendance at major campaign functions, did not ask for specific amounts given, or their individual incomes. I talked over my list of people to interview with Tom Becker, then the Development Officer now President, and did not interview those individuals he asked to be omitted. I did not want to interfere with the development process. It was their campaign and I did not want to be responsible for losing them a potential donor.

What I found was that I was warmly received into nearly every household where I conducted an interview. My original biases on the nature of people of means were dispelled. Not every Chautauquan I interviewed was wealthy. Chautauquans were friendly, open, hospitable, sincere, and usually very forthcoming in their attempts to help me learn about my

topic. I garnered a reputation among them that amounted to my interviews helping them learn more about their unspoken ideas on Chautauqua, benefiting us all.

The only restriction I was asked to consider was not to interview one of their most prominent and generous donors because of health issues. After his death, I did speak with his wife. Aside from that request, the Institution staff in no way interfered with my research and were helpful whenever I had questions. There was never, to my knowledge, a background check done, or if there were inquiries, they were never made known to me. The multiple descriptions from informants are consolidated into consistent stories and generalizations. Field notes and taped interviews are drawn upon in later chapters to describe the philanthropic interactions between certain individuals and the Institution.

The archival research was conducted in the Institution's library and provided an overview of Chautauqua's philanthropic history. The material provides the primary information for the history chapter documenting the Institution's goals and its methods for funding those goals at specific historical junctures. The institutional records allowed me to document how philanthropy at Chautauqua has shifted over time in accordance with the various types of internal and external influences at work during specific historical periods.

Chapter Summary:

My research question then becomes: what drives successful philanthropic exchange through time. There is a minimal amount of anthropological study on philanthropy. This study adds to the literature by filling an open niche in the discipline. An important contribution is the triangulation of theories of reciprocity and exchange, place theory, and socio-linguistic studies on ideological exchange. By bringing to bear a cross disciplined approach to the study and

interpretation of philanthropic exchange; I endeavor to tell a larger story of philanthropy at Chautauqua Institution.

The following chapters build a description of the Institution; its philanthropic history; a chapter dedicated to the philanthropic campaign I studied; a case study of Richard Miller who was responsible for the restructuring of the Institution, great grandson of Chautauqua Founder Lewis Miller; and an analytical chapter that discloses the mechanisms of giving dedicated to how Chautauquans develop ideologically charged domains of philanthropy constituted through exchange. The final chapter will summarize and integrate the arguments presented.

Chapter 2

The Chautauqua Institution: “The Place That Never Leaves You”

The Chautauqua Institution is a place removed from the day-to-day world, where some of the leading thinkers of our time come to share the concerns and issues of the real world. It is a place where an abundance of music, dance and the visual arts find their own forms of expression. It is Chautauqua's extraordinary mix that draws over 183,000 people each summer.

[Chautauqua Institution web site]

My Father used to talk about ‘the productive use of the margins of time,’ how education never stops. For us at Chautauqua, vacation time is not a freedom from work; it is a necessary part of a whole life. And we need a variety of things for our ‘margins.’ I use the word cornucopia to describe this place — it suggests a spilling out, an overabundance. We needn’t and shouldn’t try to confine it all some-how. You learn to make choices at Chautauqua. [Mary Frances Cram daughter of long time Institution President Arthur Bestor]



Figure 2-1 The Brick Walk, Benson (c)

Chautauqua has a public relations problem. Some call it the best-kept secret in America. People unfamiliar with the place have a hard time digesting the magnitude of its offerings and the insulatory “Brigadoon” effect that permeates the place. It’s best sold by word of mouth: the information about Chautauqua is transmitted by Chautauquans.

The standard situation is a family or friend invites another and the visit starts the conversion. Describing what makes Chautauqua so compelling is difficult without having the grounds as a backdrop. There are tree-filled pedestrian walkways, Victorian front porches full of chatters, musicians practicing on Bestor Plaza, venue after venue dedicated to art, a breeze from the lake,

religion, theater, politics, education, and music.⁵ For old time Chautauquans, the groups I am most concerned with here, kinship and its history and the role of the family home play an important part of the experience. For the converted it is a deep, rich, and multi-faceted experience reflecting family, appreciation and love of the place, satisfaction with the program and the intermingled roots of people, program and place. It's the personalization of Chautauqua that binds the individual to the Institution by mixing the qualities of the person with the qualities of the place.

This introductory section is composed of descriptions of the demographics, program, economics, and the administration that govern the Institution. I will insert insights from Chautauquans on the topics covered to bring the larger story together. Being a place valuing the cerebral, I begin with the mission statement below, which is the core narrative of Chautauqua. It is the ideological blueprint from which the Institution formally derives the heart of its identity, didactic focus, its religiosity, and its heteroglossic humanism:

The Chautauqua Challenge

To be a Center for the identification and development of the best in human values through a program which:

Encourages the identification and exploration of the value dimensions in the important religious, social and political issues of our time;

Stimulates the provocative, thoughtful involvement of individuals and families in creative response to such issues on a high level of competence and commitment;

Promotes excellence and creativity in the appreciation, performance and teachings of the arts.

To be a community in which religious faith is perceived, interpreted and experienced as central to the understanding and expression of our social and cultural values, and which, while open to all, is distinctly founded upon and expressive of the convictions of the Christian tradition.

To be a resource for the enriched understanding of the opportunities and

obligations of community, family and personal life by fostering the sharing of varied cultural, educational, religious and recreational experiences in an atmosphere of participation by persons of all ages and backgrounds.

Chautauqua is an internationally known nonprofit institution that by self-definition is dedicated to educational, cultural,⁶ religious, and recreational development of its participants. The Institution is located on the shores of Chautauqua Lake, in Chautauqua County, the southwestern most county in New York State. Founded through the collaboration of entrepreneur and philanthropist Lewis Miller and theologian and Methodist minister John Heyl Vincent, the Institution began as a joint venture between philanthropy and education, between capital and social welfare. It is listed on the National Registry of Historic Places and designated a National Historic Landmark. During my period of study, 1991-1995, the Institution was attended by an average of 183,000 middle and upper middle class visitors,⁷ the majority of whom return with their families annually (Dickson 1996, NAM 1991, 1998). Once a New York State certified university, the founding institution to nearly 10,000 "Chautauquas" nationwide,⁸ initiator of one of the first degree granting correspondence schools in the United States, the model for the now defunct Disney Institute, and a long standing supporter of education, civic action, and the arts in the private sector: Chautauqua Institution is an excellent site for studying a nonprofit at work and of the products, processes, and problems of contemporary philanthropy (Chautauqua Publication 1990; P. Hall 1992; Irwin 1991, 1987; Marcus 1996; Morrison 1974; Powell 1987; Remick 1974; Van Til 1990, Vincent 1886).

The summer season at Chautauqua is a mixture of experiences at a number of levels. The average day can consist of a morning religious service, a daily lecture by a speaker of prominence, a lunch with a sidewalk literary review; an afternoon lecture from the religion department, or a class in anything from painting, to mysticism, to astronomy, to Kierkegaard;

and then an evening with the family, friends, the symphony, opera, play or pop entertainment. Sports include sailing, biking, swimming, tennis, baseball, and lawn bowling. It is a little bit of this, a little bit of that people take in doses and choose what to take and when. They try new stuff, like some and reject others. The days are interspersed with the ubiquitous sits on the front porch and dinners and evening parties where conversation represents the gauntlet of interests of Chautauquans. This freedom of choice and the bounty of things to do is a critical component of the Chautauqua Experience. The following sitemap is from the 2010 website .

ARTS Chamber Music Dance Family Entertainment Opera Popular Entertainment Symphony Theater Visual Arts EDUCATION 55+ / Exploritas CLSC Lecture Platform Library Schools Special Studies Contemporary Issues Writers' Center	RELIGION Chaplains Interfaith Lectures Sacred Song Youth Choir Abrahamic Program Mystic Heart Program RECREATION Fitness Center Golf Sailing Sports Club Swimming Tennis Youth	ABOUT About Board of Trustees Challenge FAQs History/Archives Maps President Year-Round Staff LODGING Accommodations Directory (PDF) Specials Athenaeum Hotel Webervations	POPULAR PAGES 2010 Calendar Latest News Bestor Plaza Cam Weather@Chautauqua Bookstore Athenaeum Hotel Conferences/Weddings e-Newsletter Mailing List Press Room Podcasts Summer@Chautauqua New to Chautauqua?	MORE Chautauquan Daily 2010 Themes Beyond the Season CHQ 360 Great Lecture Library Employment Chautauqua Cinema Wi-Fi Hot Spots Bird, Tree & Garden Jazz@Chautauqua Chautauqua Network Cohen Recording Studio Women's Club Property Owners
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Chris Redmond was a regular attendee and when I met him he had developed a scholar's fascination with the place. Having composed a book of ghost stories about various Chautauqua landmarks, he also compiled the "All Our Good Things: An Independent Guide to Chautauqua" with hundreds of terms explaining the multiple facets of the Institution. A quote from the introduction to his guide follows:

Chautauqua, subject of many books and much lyrical praise, has not been fully described in any one book It is hard to explain Chautauqua to someone who has not yet been there. Chautauqua is a physical place with streets and houses; Chautauqua is a village with a year-round life; Chautauqua is a resort with recreational and cultural program in summer; Chautauqua is the place for summer schools and educational programs; Chautauqua is the home for a set of ideas and ideals that have influenced other aspects of American public life; Chautauqua is a museum in nineteenth-century civilized life and a model for the civilized life of the twenty-first century. [Redmond unpublished manuscript]

The nine-week summer season is when Chautauqua runs its full program and is when the grounds are most fully populated with visitors. It is broken into theme weeks concentrating on various topics. Examples of topics are: War and Peace; National Affairs: The Moral State of the Union; The Second Chautauqua Conference on Central America; America: One People or Several?; Great Teachers and the 1995 Chautauqua Lecture Themes; World Competitiveness of U.S. Education and Industry; the Arts and Social Change; Crime and Punishment; and The Boundaries of Life. The focal 10:45 AM lecture platform is the centerpiece of every day and hosts speakers that give talks on the topic of the theme week. Figures such as Bill Clinton, Al Gore, Daniel Boorstin, Jonathan Kozol, Ralph Nader, Sandra Day O'Connor, Jim Lehrer, Roger Rosenblatt, Freeman Dyson, Juan Williams, and Tom Ridge, have spoken from the amphitheater's podium. Some of the historical benchmarks center around public personas who have visited or lived on the grounds. Presidents Ulysses S. Grant, Teddy Roosevelt (said of Chautauqua that it is "the Most American Place in America"), Franklin D. Roosevelt (gave his "No More War" speech from the amphitheater), and Bill Clinton have visited the grounds while in office.⁹ The Women's Temperance Union held its first organizational offices on the lake shore. And famous visitors include Jane Adams, William Jennings Bryan, Margaret Mead, Henry Ford, Thomas Edison (who married co-founder Miller's daughter Mina, his second marriage), Karl Menninger, and Amelia Earhart.

Between 1991 and 1996, the time of this study, the Institution had over 1,000 programs active during the nine-week summer season. The Institution had an average of 10,000 daily visitors, 15,000 visits in the off-season. There were roughly 500 winter residents. The year round staff was made up of seventy-five individuals. The Institution employed 1,700 people during the summer season while private businesses employ another 700. These are restaurants, caterers, lawn and landscapers, plumbers, electricians, carpenters, nurses, pavers, painters, shop keepers, and other maintenance and service oriented businesses. There were over 1,200 private households owning properties of high value to substantially high value (hundreds of thousands to millions). The Institution owned 110 buildings on fourteen miles of road and thousands of parking places. Property and equipment owned by the Institution had a book value of well over \$15 million including a utility district and water treatment plant. There were a total of 758 acres, 358 then on the grounds, 400 of it off site.¹⁰ The Institution owned two print publications: The Chautauqua Daily, published six days a week during the nine-week season with an average



Figure 2-2 Musicians on Bestor Plaza, Benson ©

circulation of 7,000 per issue, and The Chautauquan published three times a year during the off-season with a circulation of approximately 20,000 issues sent to those on Chautauqua's mailing list.¹¹ The budget averaged around \$12,000,000 for annual operations: of that \$5 million derived from gate ticket sales; \$4.5

million from gross income from the golf course, bookstore, maintenance and other service fees; and \$2.5 million from private philanthropy (Chautauqua Challenge Volunteer Handbook 1993a).



Figure 2-3 Bric-a- Brac House, Benson ©

Populated by a cross section of people from the triangle of Cleveland, Pittsburgh and Buffalo, Chautauqua draws the majority of its audience from the tri-state (New York, Pennsylvania, and Ohio) area and then from the rest of the United States and Canada. Family cottages and homes have been constructed to replace the first tents; sewer lines have been buried, water and electric plants built. In 1874 a fence was erected to keep free loaders out. The season's length expanded from fifteen days in 1874 and 1875 to twenty-four days in 1876, forty-seven in 1881 and progressively grew to the current sixty-five days established

roughly at the turn of the century (Irwin 1987:13).

The Chautauqua community is a cultural hybrid. It lies somewhere between a historical village, a museum, a resort, and a pre-WW2 Anytown USA with front porch neighborhoods, ice cream stands, and Sunday afternoon band concerts. It is the antithesis of the suburbs. Emma Flagg says that the culture is matrilineal as for most of the history of the place women, the “weekday widows”, were here with the children during the weeks, while the working husbands could only come on the weekends. It speaks to a culture that is domestic in nature, family oriented, and pedestrian. I was told that potential spouses are tested here. If the young man doesn't like Chautauqua, the young lady stops liking the young man.

Chautauqua's grounds are meticulously maintained by staff and residents either maintain their own properties or have contractors maintain their properties: clean, manicured, and sculpted. The majority of the houses, both new and old, are turn-of-the-century Victorian in style:¹² porched, covered with bric-a-brac and beautifully painted. On the streets poets, dancers, writers, artists, professors, professionals, children, teens, parents, grandparents, teachers, politicians, grounds workers, and business people intermingle. Walking at night on turn-of-the-century brick streets with the symphony playing, the people safe, the porches full; provides an ambiance of experience that is exquisite, enriching, and secure. The value of safety for children and their elders is one of the most powerful attributes of the Institution. "We can let our kids just go and go" stories abound and there are stories about those who leave priceless jewels on their dressers who would not wear such jewels in public "back home". As a means of investing the self in Chautauqua participating in its features makes it "their territory" (Basso 1996:xiii).

People call the special feeling they get at Chautauqua the "Brigadoon Affect", or the "Warm Blanket Affect", a sense of security, spirituality and isolation from the volatile happenings of the outside world. Texan Bess Morrison, a lifetime Chautauquan, defined it as a "spiritual place", her words and demeanor suggesting the mystical products of *liminality* and *communitas* within the gates (Turner 1974:47, 53). Many individuals call Chautauqua the only "real home" they have when contemporary lifestyles in which families are dispersed all over the country are considered (Jackson 1995). It is a place outside the mainstream, an almost private, secret place that evokes sentiment and nostalgia. One Chautauquan went so far as to break down in tears when he verbalized his fear of not being able to die at Chautauqua. For hard core Chautauquans it's more than a special place, it's a harmonious Eden, a safe harbor; a citadel on the hill; an American Shangri la. It is not immune from petty crimes, rude or challenging

enactments of identity, and social prejudices, but these are not part of the public dialog of the Institution. Interpersonal or community problems are infrequent and although their occurrence *is* part of the overarching Chautauquan narrative, they are not part of the average visitors stay.

Program

The four cornerstones of the Chautauqua program are art, education, religion and recreation.

The “Chautauqua Experience” pivots on various levels of participation each guest makes into these four areas. There are thousands of things one can do over the course of a summer. Classes range from dance to furniture restoration, talks from theology to politics, sports from golf to swimming, and music from opera to rock.¹³

A symphony orchestra became part of the regular program in 1920. The Chautauqua Symphony Orchestra, founded in 1929, now performs each week with leading soloists, and popular entertainers are featured other evenings. The Chautauqua Ballet Company also performs four times each season, while Chautauqua Conservatory Theater Company plays feature guest artists and conservatory actors. The Chautauqua Opera Company, also founded in 1929, performs four operas in English, and there is a very popular Monday afternoon chamber music series. Concerts featuring Chautauqua's Massey Memorial Organ (the largest outdoor pipe organ in the world) are scheduled throughout the summer as well. Also, a charming and comfortable 350 seat air-conditioned theater, the Chautauqua Cinema, offers a summer-long festival of the year's best movies, first-run "art" films and classics. [Chautauqua Institution Web Site 1998]

The arts and cultural programs include live performances of the Chautauqua Symphony Orchestra holding regular symphony concerts featuring distinguished guest conductors and soloists held at the outdoor Amphitheater. The Chautauqua Opera hosts regular opera/theater offerings in English at the Norton Memorial Hall. The Chautauqua Conservancy Theater conducts professional theater productions in Bratton Hall; newly rebuilt theater replacing a rustic and uncomfortable theater building. The Chautauqua Ballet Company in the School of Dance conducts regular performances. The Family Entertainment Series is a relatively new product that

offers performances Tuesday evenings for children. The Chautauqua Center for the Visual Arts provides painting and sculpture shows at its facility during the season. There are also the art schools which offer season extended periods of study for students from around the world:

A summer of intensive study is offered students on the verge of professional careers who audition for admittance into Chautauqua's schools of fine and performing arts. Students are provided opportunities for personal growth and exciting performances and exhibitions throughout the season. Chautauqua's School of Art and the Chautauqua Center for the Visual Arts (CCVA) provide lectures as well as contemporary and traditional exhibitions featuring distinguished artists. [Chautauqua Institution Web Site:1998]

Walking the grounds can be an immersion in art from absorbing the architecture, to eavesdropping on various rehearsals or practicing musicians and singers, to watching painters or listening to poets recite their works. Evening walks are especially rewarding for this type of tour.

Della Penick had a holistic vision that integrated her family's many decades of attendance, participation and service to the Institution; her current family home on the grounds; and her love of nature and architecture that permeates the place. The "sense of family" is powerful for her and bleeds over to Chautauqua as a whole. It is a persuasive sense of being at "Home" that defines core experience that for her is a core element of her life. Penick, with 60 summers at Chautauqua at the time of the interview, had been coming to Chautauqua every year of her life. "My father wasn't 'a sportsman' but he loved the Institution and he loved raising money". Of the multiple aunts, uncles, cousins and siblings that are here, 10 own property and four stay for the full season, which is rare these days. "I can expect to see family just about anywhere on the grounds and I do". She and her family have volunteered to serve on boards and committees and are ardent fundraisers for the institution.



Fig. 2-4 Benson ©



Fig 2-5. Kellogg House Benson ©

“Being by yourself is not possible here; to find quiet. Between the program and family and friends, there’s always something happening.” Her long-term ties to the community give her credibility with other Chautauquans. She felt very possessive about the natural beauty of Chautauqua: “The four seasons [almost tears] the whole place makes me so happy; the weeds and wild flowers. The Victorian architecture in combination with the natural beauty and the “sense of family”, cousin, aunts, uncles; real kin everywhere: Chautauqua is the core. It is *home*”. Her deep-seated connection stays with her year-round and is a clear example of the “place that never

leaves you”. Richard Miller notes that the program during this historical period was attracting the largest audiences to events that spoke to a broader citizenship and global and international issues.

Education

Lifelong learning is central to the ideology of Chautauquans. It can take the form of conversations after lectures, classes, and performances, the lectures themselves or in participating in the Chautauqua Literary and Scientific Circle (CLSC) book club.

Every weekday at 10:45 a.m. the Amphitheater stage becomes a platform for scientists, authors, educators and other experts in such fields as national and international affairs, politics, arts and humanities, education, business and the environment. After the lecture Chautauqua's audiences have the opportunity to participate in question-and-answer sessions.

The School of Art offered an eight-week summer studio program for scholarship and non-scholarship students with short courses for serious amateurs in such areas as ceramics, drawing, painting, fibers, sculpture, metal crafts and photography. The School of Dance

program is for young professionals and remarkable students in classical ballet. They also had dance classes for Chautauquans in ballet, modern dance, and jazz and a number of music studies classes. The School of Music enrolled students in the Festival Orchestra, Youth Orchestra, and various piano and voice programs. The Theater Conservancy offered an eight-week program for training for high school and college students that can lead to further study or careers in theater for members of either group. The Special Studies program offered more than 200 classes for all age groups including literature and writing, business and finance, personal development, handicrafts, contemporary issues, and more. ¹⁴

There were a number of age specific programs that take place at the Children's School and the Pre-Club for young children, the Boy's and Girl's Club, the Youth Activities Center and the College Club.

There are nine performance facilities:

Facility	Primary Uses	Capacity
Amphitheater	Performing Arts, Lectures, Worship Services, Rehearsals	5500
Norton Memorial Hall	Opera, Chamber Music, Recitals	1365
Hall of Philosophy	Lectures	745
Elizabeth S. Lenna Hall	Recitals, Rehearsals	500
Smith-Wilkes Hall	Lectures, Rehearsals, Performing Arts	450
Normal Hall	Theater	145
Hall of Christ	Worship, Chamber Music, Recitals, Films	200
McKnight Hall	Recitals, Rehearsals	100
Bellinger Hall	Dormitory, Conference Center, Cafeteria: 250 beds 5 meeting rooms	

Youth

The Children's School, conducted Monday-Friday from 9 a.m. to noon, is an early childhood center for youngsters ages 3-5. The developmentally based program includes a wide range of social, recreational and educational activities supervised by certified

teachers assisted by interns, college students, and high-school aides. Group One is designed for children who will be entering first grade in the fall. This full-day program, 9 a.m.-noon, 2-4 p.m., Monday-Friday, includes active play, arts activities, swimming instruction and special events.

Boys' and Girls' Club is a day camp for young people who will be entering second grade to those entering tenth grade in the fall. It is a full-day program 9 a.m.-noon, 2-4 p.m., Monday-Friday, that includes swimming, crafts, music and art activities, field games and sports, sailing, nature study and special events. Staffed by teachers and other adult professionals, college and high school age counselors and counselors-in-training, the Club program is held on a scenic campus along the water front.

The Youth Activities Center is designed as a gathering spot for junior and senior high school age young people, with a snack bar, games, pool and table tennis, as well as television and lounge areas. Dances, excursions and special activities for specific interests or ages are planned in conjunction with the young people themselves.

The College Club serves as a meeting place for college-age young adults. In addition to providing comfortable lounges, table tennis and pool tables, a snack bar and beach area, the club initiates special programs as guided by member interest, including guest speakers, movies, live entertainment and service projects.

A Family Entertainment Series is presented every Tuesday evening at 7 p.m. featuring singers, musicians, actors, puppeteers, and storytellers. A small fee is charged. A number of open enrollment special studies classes are especially designed for young people. The institution's Department of Religion youth and young adult ministry includes concerts, discussions, and worship. Junior golf and tennis opportunities are also available. [Chautauqua Institution Web Site:1998]

The 55+ Program for Adults is a weekend residential program featuring discussions, workshops, lectures, and musical performances. The program takes place in the off-season on weekends with a cultural program on Saturday night.

The Chautauqua Literary and Scientific Circle (CLSC), a year round reading program, the "the oldest continuous book club in America", founded in 1878, introduced learning by correspondence, enrolled at least a half-million readers, and at one time sponsored 10,000 reading circles. Each week during the summer season a CLSC author is featured at a roundtable lecture, the CLSC authorities choose five recent books each year, with a strong focus on American culture and public policy. The CLSC also provides reading enrichment for kids' ages

10 to 14. Someone who registers for four years and reads all the books is entitled to graduate from the CLSC - a transition observed with the rituals of Recognition Day--and become a member of the Alumni Association that sponsors a series of literary talks, poetry brown bags, and social events. The CLSC bookstore is located on the brick walk between Bestor Plaza and the Amphitheater (Irwin 1987:42-44; Redmond unpublished manuscript).

The Smith Memorial Library on the grounds is part of the Chautauqua-Cattaraugus Library System. In 1994 the library was granted funds for renovation of the library in general and the relocation of the archives into a climate controlled environment.

Religion

The functions of the Department of Religion are critical to the well rounded “Chautauqua Experience” and reinforce co-founder Methodist Bishop John Vincent’s, vision of what he called “pandenominationalism” for a plural religious Chautauqua. Many Chautauquans have told me the essence



Fig. 2-6 Palestine Park, Benson ©

of the experience is the spiritual dimension. “The fundamental mission of the Chautauqua Institution is to bring to life and revivify the deepest religious impulses of ordinary thinking Americans” (Chautauqua Institution Web Site 1998). The Department provides ecumenical and interfaith services along with lectures and educational programs. Sunday and weekday morning worship services are for the most part rooted in the Christian faith, while an afternoon lecture series addresses ethical and moral issues from broad interfaith points of view.

The Chautauqua Choir composed of 80 members, leads the Sunday services while the Motet Choir of 40 voices leads the daily services. The department presents continuing education seminars in hymnody, choral music conducting, organ service music, and church architecture.

The synagogue services are not part of the guidelines laid out in the Chautauqua Challenge, but they take place on a regular basis. The continuing education courses in religion and philosophy are part of special studies program.

A daily worship service was conducted by differing guest chaplains. In a given week there is the daily morning service, at 2 p.m. a lecture in the Hall of Philosophy, a Catholic Mass, Palestine Park tour (founder Vincent had a scale model of the Holy Land sculpted near the lake), a Bible class, and Episcopal Holy Eucharist service, youth ministry, service of Blessing and Healing, a Social Hour, and Open Forum, a Christian Science Service, Devotional Services, and on Saturdays Jewish Services.¹⁵ Sunday is its own special day, the only day free of a gate cost during the summer season, which has sixteen different religious services, performance and events (Chautauqua Institution Web Site:1998).¹⁶

The Department provides Sunday school for children through grade six and a daily Biblical Arts Workshop for Children. The department also sponsors the youth ministry of the pastor of the Hurlbut Church focused on high school seniors and college age students (Chautauqua Challenge Volunteer Handbook 1993a).

There are 16 denominational houses on the grounds plus a number of religious organizations such as the Chautauquans for a Christian Focus, Hurlbut Church, King's Daughters and Sons, and the Youth Ministry that hold their own religious programming. The denominational houses are the Baptist House, Benedict House, Christian Science House, Deaconess Home, Disciples House, Episcopal House, Lutheran House, Maranantha House,

Methodist House, Missionary Home, Presbyterian House, Reformed Church House, United Church of Christ House, United Methodist House, and the Unity Church House. Noreen Camden, then hostess at the Baptist house, was a strong advocate of the denominational houses. Their low cost, home cooked meals, shared baths and central living rooms make for a friendly social climate for Chautauqua vacations. The accommodations represent the housing once the norm on the grounds. “We don’t even have keys for the rooms,” said Camden.

Recreation

Chautauqua’s recreation program greases the skids of its educational and cultural programming. John Vincent recognized that people must play while they learn and the grounds grew to hold tennis courts, a golf course, sports of all types, water sports, and more.

Chautauqua's original golf course was redesigned by Donald Ross in 1924. Expanded to 36 holes in 1994 based on the design of Xen Hassenplug, the rolling wooded terrain offers diverse challenges to golfers of all abilities. Daily greens fees range from \$27-32. Power carts, a snack bar, lessons, clinics, junior programs are all available.

Chautauqua maintains eight Har-Tru tennis courts and four hard courts. Private lessons, tournaments, clinics, adult and junior memberships and a junior skills program are all available.

Four well-tended public beaches, including a children's beach, are open throughout the summer season. All are guarded by certified lifeguards.

Located on the lake front, the Chautauqua Sports Club offers short-term boat rentals (sailboats, paddle boats, kayaks, and canoes), as well as shuffleboard and lawn bowling. The Sports Club also organizes softball and volleyball leagues, bridge games and an annual walk/run is held in conjunction with Chautauqua's birthday celebration each August. Age restrictions apply to certain activities. [Chautauqua Institution Web Site:1998]

In addition to the above there are walking trails, running areas, and rental shops for bicycling and sailing. People also fish, water ski, and swim off the four supervised public bathing beaches.

There are playing fields and facilities for volleyball, basketball, lawn bowling, shuffleboard,

softball, and baseball. Recreation is one of the four branches of the Chautauqua platform which co-founder Vincent said was essential to offset the rigors of learning. All work and no play make for one dull Chautauquan. Visitors like Robert Bargar remembered how much having the tennis courts, golf course and beaches, for example, add to youthful experiences.

Clubs and Organizations

There are a large number of clubs and associations that occupy people's interests from season to season. The Chautauqua Art Association operates the art gallery. The Bird, Tree, and Garden Club, "a club of nature enthusiasts" (Redmond unpublished manuscript), holds programming on nature, conservation, nature walks, and beautification; is over 80 years old; meets in the Smith-Wilkes Hall; and holds an annual mushroom sandwich luncheon for those with a refined palette. Brown Bag Poets meet on a weekly basis on the porch of Alumni Hall. The lunches consist of short talk and then poetry reading by the participants. Chautauquans for a Christian Focus is a group of like-minded Chautauquans who began to meet with the idea of preserving their version of traditional Chautauqua. The Hurlbut Church is a year round church operated for local constituents and seasonal visitors. The International Order of the King's Daughters and Sons is a philanthropic Christian service organization of various charities and scholarships. The Peace Society sponsors speakers and seminars on peace on earth, "the nearest thing, perhaps, that Chautauqua boasts to a body of left-wing radicals" (Redmond Unpublished manuscript). The Chautauqua Property Owners is a group founded in the 1880 giving voice to property owners and including two members on the Institution's Board of Trustees who serve both as property owners and as the liaisons to the Institution. The Sport Club provides the facilities for shuffleboard, lawn bowling, bridge, sailboat and canoe rentals, basketball, volleyball and

baseball leagues, and the annual Old First Night Run. The Women's Club is one of the most prominent organizations on the grounds. Founding home to the WTCU, the club hosts daily events, seminars, and speakers. They also raise funds for scholarships for young people, writing symposiums, and sidewalk sales. The Yacht Club sponsors racing events and holds like-minded individuals in awe of each other.

Ritual

There are a number of rituals at Chautauqua; products of history and tradition. They provide amalgamations of Chautauqua ideology that suture the “Chautauqua Experience” together for the old time Chautauquas I worked with. To graduate from the CLSC, attend the annual Old First Night, to make *both* the opening and closing Three Taps of the gavel ceremonies signify dedication and devotion to the Institution and what it stands for.

Many of the rituals are combined at Old First Night; the event inventories and performs what is important to Chautauquans. Old First Night is held on the first Tuesday of August corresponding to the first Assembly in 1874. It is the only occasion when gifts are directly solicited from a general audience and the totals from the summers fund raising from the various schools and organizations are announced in the program (Morrison 1974:36; Redmond Unpublished Manuscript). Old First Night opens with the Star Spangled Banner, Happy Birthday to Chautauqua, a vespers service, and a choir performance. The Institution president, in my case Dan Bratton, opened the ceremony and announced the total of the summer’s “Chautauqua Fund” outlining the importance of philanthropy to the Institution. A Master of Ceremonies is then introduced.

The Community Gift was then solicited with “Shorty” Follensbee and his ushers passed large baskets. “OK ushers, COME ON DOWN!” The proceeds are then dumped into a larger basket at the feet of the Development Director, in the person of Tom Becker during the early 1990s. The baskets are then taken out back for a count.

The Children's School conducts a performance (children two-six years old) and announces the size of their gift. The Boy's and Girl's Club similarly stages a presentation (Chautauqua Song) and announces their gift.¹⁷ The Women's Club conducts a performance, in my case it was a Victorian skit with all the trimmings, and they announced their gift.

A general performance is conducted by a musical or choral group. The 1993 OFN saw the "Thundering Bases".

The emcee speaks and the "Drooping of the Lilies", a ritual of silently raising and lowering of a white handkerchief is performed to remember past Chautauquans; an emotional moment for participants accompanied by the music "Man from La Mancha" (Dream the Impossible Dream). The same action is taken for the "Chautauqua Salute. Various groups and organizations announce their gifts in a "Roll Call", then more speech on the sanctity and nostalgia of Chautauqua.

The next Roll Call is a means of recognizing the number of years participants have been coming to the Institution. First-time Chautauquans are given special attention, standing and then taking their seats. As the most recent guests sit, two-nine year visitors are recognized and then sit, followed by ten-twenty-four year visitors, twenty-five-forty-four year visitors, forty-five-fifty-nine, sixty or more, seventy or more, eighty or more and finally left standing (feebly) are those who have been visiting Chautauqua for ninety years or more. There is the according applause and the Roll Call of the Generations begins in the same standing and sitting fashion, beginning with those who are first generation attendees to those representing greater and greater number of descending generations attending Chautauqua. Applause mounts as the number of those remaining standing shrinks and finally there is only one person. My night ended with a Mrs. Fitzwater who was recognized for having eight generations at Chautauqua; she was also over 90 who received a standing ovation.

The "Battle of the States" then takes place where the "partisans of various states and regions are invited to shout their loudest in turn. The real competition is between New York, Ohio and Pennsylvania" (Redmond Unpublished Manuscript).

The “Community Gift” collected from the audience earlier is then announced. The celebration is concluded with a birthday cake and many parties and socials at the denominational houses. It is customary to leave the lights burning throughout the night.

Another tradition is the “Three Taps of Gavel” that opens and closes the season. Every Sunday evening is the important hour long Sacred Song Service begun with “Day is Dying” and ended with “Now the Day is Over.” There is the elaborate all-day graduation ceremony of the CLSC complete with Banner parade (each class designs its own banner), and day and evening graduation ceremony. Dick Brectold, a Director on the Institution’s Board and campaign volunteer who has served in numerous committees and task forces, talked about “the mix” that was the combination of everything that made for the Chautauqua Experience. “It’s the passion that’s amazing.” Paul Irion, a life-long Chautauquan, Board member and campaign team leader, said that having so much available and the ability to be involved in so much was “participating in the continuity of history.”

Cemetery

Riding up the winding road of Saint Agnes Cemetery in the back of the rattling old truck, Francis Phelan became aware that the dead, even more than the living, settled down in neighborhoods. The truck was suddenly surrounded by fields of monuments and cenotaphs of kindred design and striking size, all guarding the privileged dead. But the truck moved on and the limits of the mere privilege became visible, for there now came the acres of truly prestigious death: illustrious men and women, captains of life without their diamonds, furs, carriages, and limousines, but buried in pomp and glory, vaulted in great tombs built like heavenly safe deposit boxes, or parts of the Acropolis. And ah yes, here too, inevitable, came the flowing masses, row upon row of them under simple headstones and simpler crosses. Here was the neighborhood of the Phelans. [opening to Ironweed, William Kennedy 1983]

One of the facts that turned up repeatedly in my interviews was that Chautauqua has its own cemetery. While not entirely true, the cemetery is actually a Town of Chautauqua cemetery, there are a large number of past Chautauquans buried there. On Memorial Day, a group of Chautauquans meet to clean up the cemetery grounds, cut overhanging branches, clean graves

stones and have a picnic lunch. I attended the 1998 clean-up and was given a tour of the more prominent graves. The cemetery had been expanded to hold more Chautauquans. A New York City couple, property owners and Jewish, said they were going to establish their own “neighborhood” in the cemetery.¹⁸ What was also of note was the number of *unoccupied* graves of living Chautauquans. The graves with head stones with names and birth dates were already in place and in fairly large numbers (15-20). An interpretation of this might be “I want to be buried at this wonderful place I love,” alongside a status symbol for impressing fellow Chautauquans. Dan Bratton, President of Chautauqua in the early 1992, commented that this was one of the few non-profits anywhere with its own cemetery. “This place became the root of people’s lives in a rootless society. That cemetery is proof that this is home, it’s permanent, that this is part of a spiritual experience.”

Governance

Chautauqua is governed by a twenty-four member Board of Trustees “representing a cross-section of cultural, business and community leaders from throughout the United States” (Chautauqua Challenge Volunteer Handbook 1993a). President Dan Bratton emphasized the key element to governance at the Institution was “flexibility”: the ability to quickly respond to problematic situations as they occur and to take advantage of positive developments to bring them into production as quickly as possible.

The Administration offices are housed on the second floor of the Colonnade building. This includes the President’s office, payroll office, media relations office and the offices of five vice-presidents: Treasurer, Department of Religion, Education and Planning, Director of Programming, Development. The Administrative and Community Services and Operations are also housed here. The Youth and Recreation, Publications, Marketing, Schools, Police,

Conference, Accommodations, and Customer Services offices are organized under the leadership of at least one of the five vice-presidents.

Power is delegated down from the twenty-four member Institution Board of Trustees through the President's Office to the five vice-presidents. The Board meets four times a year. Many are retired executives from top ranking American corporations. All donate to the Institution's campaigns. The nomination committee chooses individuals who will work hard at their job for the Institution. The Institution since the 1960's has been rebuilt by an active board that replaced an earlier sedentary incestuous rubber stamp board composed of members from old Chautauquan families.

The Board's duties are to clearly define the direction, policy and objectives for the Institution. The "Design for the Decade" was a seven page document was constructed and approved by the Board in 1991 that detailed exactly where the Board expected the Institution to be in ten years. Actually a five year plan, it was the first major summary of goals and mission to be followed in detail. The document is composed of six sections: Program Development, Facilities, Marketing, Land Use and Development, Financial Resources, and Management and Administration. The Design was the single most important tool for planning the philanthropic drive that followed, "The Chautauqua Challenge" campaign; a fund raising effort that saved the institution and established a sound foundation for the future. The Design explicitly plotted what was to be done and how much it was expected to cost. Planning, once only haphazard in Chautauqua's history, is now normal procedure; plans extend ten years into the future.

The Chautauqua Foundation with a nineteen member Board of Directors is the second major institutional power. The Foundation is charged with philanthropic development: "to solicit and receive and to acquire by gift, purchase, devise, bequest, or in other lawful ways, real,

and personal property” for the Institution (Chautauqua Volunteer Handbook 1993a). Then Director of Development Tom Becker was shared half time between the Institution and the Chautauqua Foundation. The Foundation provides the philanthropic funds to operate the Institution and directs endowments and campaigns.

Budget

The Institution budget expenses were as follows: Program; Religion; Operations and Community Services; Education Youth, Recreation; Chautauqua Daily; Marketing; Administrative; Development; Depreciation; Employee Benefits; Undistributed/Overhead. The sources of revenue were held in funds designated as: Program Related; Operations and Community Services; Education, Youth and Recreation; Chautauqua Daily; Miscellaneous. The Institution gift revenue comes from the Chautauqua Fund (the annual drive), the Chautauqua Foundation, and other gifts. The Golf Course, Bookstore and Athenaeum Hotel are profit-generating entities owned by the Institution. The profits from these three enterprises contribute to the annual budget. The price of entry into the grounds is also part of the financial picture.

Points of View

Generalizing, especially when Bakhtin is invoked, is to admit a frustrating sacrifice of the rich complexity transpiring between people and their place. Korzybski reminds me, “the map is not the territory”. Generating a useful set of points of view of the Institution comes through filtering interviews and conversations I had with Chautauquans and administrators. There are certain key topics that regularly arose from one interview to the next that lead me to conclude that these are the central narratives authoring what individuals describe as the identity they develop through the “Chautauqua Experience” (Holland, Skinner, Lachicotte and Cain 1998:3-4,

4-9). Through the dialogic relationships I was involved in during fieldwork and then on through the research and writing, I came to recognize a number of pivotal narratives that constitute a Chautauquan speech genre and its accompanying ideology (Bruner and Gorfain 1984:57). So I am going to play a bit of three-way ideological badminton presenting my theorists, individual Chautauquans and the Institution's material in what follows. It is at these heteroglossic confluences that the knitting together of joint points of view happens. It is an attempt to present the general feel for how Chautauqua becomes an experience lived by Chautauquans in the give and take that makes up their interactions there. This foundation will then inform the analysis of philanthropy developed in later chapters.

Bakhtin reminds us that the ideological inculcation process is staged at the junction of interactions among people's competing meanings where new semantic domains are opened. "Discourse is able to reveal ever new ways *to mean*" (Bakhtin 1981:282, 1986:72, 75, 77; emphasis in original, 1981:345-346; Hill 1986:92). The ideological discourse of Chautauqua is absorbed, becomes what Bakhtin calls an *authoritative discourse* or an *internally persuasive discourse* (Bakhtin 1981:272, 282); through:1). experiencing the physical place in its myriad of personal, natural and architectural forms; 2). participation in the social structure including family interactions, the socialization process, homes, neighborhoods, religious affiliations, philanthropic interactions; 3). dialogic exchanges with other Chautauquans; and, 4). engaging in the programming that is fundamental to the mission of Chautauqua and a fundamental reason why people come to the Institution in the first place. John Cavins a long time Chautauquan says once you've been here and really absorbed the fundamentals of the place, "you can't go home again and be the same person".

The ideological exchange is constructed during the interaction of these basic domains, then over time and in a regiment of activity; creates the environs that make Chautauquans themselves the entities that carry and produce the culture at Chautauqua.

So before detailing more of the nuts and bolts of the Institution, I will present descriptions of Chautauqua from Chautauquans' perspectives that I draw from my interviews.¹⁹ The basic reason for this study is understanding philanthropy at the Institution; I spent the majority of my time with that 20 percent of the population responsible for 80 percent of the donations. These participants in Chautauqua are known as The Brahmins. They are long time comers, deeply embedded in the traditions and history of the place and with sound track records of participating at various levels in the activities required for what is perceived by other visitors to be an authentic experience of the place: Board members, property owners, visitors with long family based relationships with the Institution, campaign volunteers, and donors. I also interviewed short-term visitors who had been coming for years and the "New" Chautauquans, who have come to the Institution since the philanthropic renaissance that began in the 1960s (outlined below). Because a fundamental axiom of this system is that ideological points of view are different I need multiple voices to tell a close to complete story and develop a compelling ethnographic narrative of Chautauqua. The fact that the stories are dissimilar, *slightly askew*, holds the key to the stylization of interactions. Bakhtin states that no two people's ideological domains or points of view can ever be identical: the "possibilities of human activity are inexhaustible" (Bakhtin 1986:60). So by presenting a number of points of view from Chautauquans, I can document some of the major ideological structures and the dynamics of the processes that relate individuals to each other and to the Institution.

The overarching argument here is that there is a co-creative process between the Institution and Chautauquans that is reflected in the ideologies of the program, the place, and the philanthropy. I will demonstrate how this works by bringing in discursive voices.

For novices, the Institution's set of guidelines provide suitable descriptions of the place. These bottled descriptions though, have for the most part, come from Chautauquans or were written by the Communications office and approved by Chautauquans on various task forces and committees. The speech genre employed by the Institution has a creamy, solicitous feel to it that reflects the polished language of the Development Director during my study who is now President, Tom Becker. Becker is well respected, referred to as "very intelligent" and was a key asset to this study opening doors and providing candid input. For instance:

You feel it the minute you step inside the gates. All who have come here before—Thomas Edison, Thurgood Marshall, Franklin Roosevelt, Susan B. Anthony, Helen Keller, Margaret Mead, Al Gore, Ken Burns, Bill Cosby, Calvin O. Butts, Bill and Hillary Clinton, Elie Wiesel, millions of learners and families—you can feel their presence in this place. Their words, art, conversation, and passion linger in the air, the buildings, the landscape. As many have said of Chautauqua: This is sacred ground. [October 2010 www.ciweb.org/chautauqua-today]

The description incorporates historical depth, connection to great minds, ethnic diversity of the podium, a "feeling" of the presence of great things transpired and transpiring as key components of the sacred. This isn't that far off the mark from how the Chautauquans I interviewed felt. Chautauqua as a place, as a home more than home, represents an emotional investment. "It's the Place that Never Leaves You". Remembering Basso:

Landscapes are available in symbolic terms as well, and so, chiefly through the manifold agencies of speech, they can be "detached" from their fixed spatial moorings and transformed into instruments of thought and vehicles of purposive behavior. Thus transformed, landscapes and the places that fill them become tools for the imagination, expressive means for accomplishing verbal deeds, and also, of course, eminently portable possessions to which individuals can maintain deep and abiding attachments, regardless of where they travel. [Basso 1996:75]

Landscape is the physical semiotic arena where everything happens that comprises the “Chautauqua Experience”. The grounds create a ‘sense of community’ many do not get at their year-round home. There are neighborhoods across the grounds that families have returned to for generations. Rebecca Forde stated that: “One of the things that tickles me is that no matter where you live in Chautauqua, that becomes your neighborhood and you can’t imagine living anywhere else. Each place has its own rewards. That each section has its own absolute charm and therefore has its own unique kinds of stories and divisions.” In most neighborhoods the houses are so close together Chautauquan Marshall Boaz said, “You can hear your neighbor change his mind.”²⁰

The grounds are the cultural incubator for the lived Chautauqua experience at the social, artistic and educational levels. There is a selection process that takes place as people decide whether they like Chautauqua or not. People looking just to be entertained do not usually frequent or at least do not continue to frequent Chautauqua after an initial visit. Tom Becker said, “The idea of this place is that it’s an engaging place. And that pure entertainment is not what we are about.” Board member David Carnahan told me, “Vegas people don’t come back here.” There’s a lot to put up with. The expense, staying on the grounds can run from \$1,500 a week for a condo to \$10,000 a week for a house. For property owners there’s a myriad of fees, car passes, season passes, garbage tickets, taxes, the barrage of philanthropic asks, land use regulations, dock fees ad infinitum. Tom Becker:

You may think you come here, because you have always come here, but the truth is you have to work to come here. I mean you do, you got to buy tickets, you get all kinds of stupid rules to where you park your damn car, you get insulted on the platform every now and then, you know, there’s just all kinds of reasons to say to hell with this I’ll go to Hilton Head or some place. All it is, is an enclave for the quote “rich”. It’s not even an enclave for the rich candidly, but the point is, that it is a place that seeks at every single level of the family that does come, the youngest to the oldest, to engage them in something, to provoke their minds to

enliven their spirits and to make them a little healthier and to send them out of here presumably more concerned about that issue of poverty or decay or whatever.

Doug Prichard a trustee representing the property owners²¹ said the selection process was tantamount to having “self-conflict with the traditions of the place; they [those seeking entertainment for its own sake] leave because they made a mistake in coming”. And there is another selection dynamic that influences attendance and long term participation. Keith Marshall a long term Chautauquan and writer himself says whether it was by design or circumstance, “this is like an old east coast WASP club.” While the Institution “agonizes about not having minorities represented,” the predominant visitors, ideology, activities, and culture are so fundamentally “white” that the status quo is self-perpetuating. If one happens not to be a WASP type person, Chautauqua can be uncomfortable.

But for those who do adopt a long-term orientation toward the place, their stay depends on a deeply rooted set of values. They come here because they believe in the place, and for many, they come because Chautauqua has been a part of their lives since childhood. Chautauqua is not a choice, it is a given in many long-term visitors lives and rests on a yearning for active engagement in a holistically defined and physically beautiful community.

Pictures tell a thousand words. But they don't begin to tell the story of Chautauqua. It is a center for culture and lifelong learning offering a mix of programs, the likes of which can be found nowhere else in the world.

Consider the possibilities . . . Symphony. Lectures. Worship services. Theater. Special studies classes. Golf. Opera. Popular entertainment. Seminars. Tennis. Ballet. Chamber music. Book signings. Sailing. Youth programs. Organ recitals. Family programs. Recitals. Open forums.

All this and more in a beautiful and peaceful lakeside setting founded on the belief that everyone “has a right to be all that he can be -- to know all that he can know.” Visit Chautauqua and find out why this world-renowned National Historic Landmark is more than a learning vacation. It is a thriving community where visitors come for intellectual and spiritual growth and renewal.

(1998 Chautauqua Tourism flier)



Fig. 2-7 Hall of Philosophy, Benson ©

Thomas Fitzwater represents a family that goes back to the founding of the Chautauqua. One of the annual celebrations or quasi rituals he mentions is the event called “Old First Night” where those whose families represent the most generations are publicly recognized. At the 1994 Old First Night, Mrs.

Fitzwater, grandmother to seven generation of

Fitzwaters for the 3rd year in a row, was the last person standing in the “Count down of the Generations”. Then 90 years old, she was the elder of note and Thomas, her grandson has telling rights to fundamental narratives at Chautauqua. Her story follows Thomas’s.

I met with the Fitzwater family at their home, as I did with the majority of my interviewees. Theirs was a very pleasant home with a beautiful wrap-around porch in the historic district a block or so away from the Hall of Philosophy. Porches are a critical element of the Chautauquan home. As a place within a place, they represent and are used for dialog about the programmatic events of the day and for resting, reading and sharing the serene space of the neighborhood with family, guests and fellow neighbors on their porches. Chautauqua is also known for its extensive bat population, one that lives in the attics of many of the older Victorians. Two benefits come from this; a low mosquito population making the porches bug free and they make for interesting evening time event by watching “the bats come out”.²²

Thomas Fitzwater who has served in multiple capacities at the Institution, led the conversation and his empathy-filled ability to talk about Chautauqua was unique. While we did discuss a number of topics about the Institution, Thomas had a distinct feel for the stories from the place. He reminisced about the foggy night of a rescue on the lake and his wife Janis filled in

the gaps: “I heard a ‘Help!’ coming from the lake. It was 2:30 in the morning. I yelled ‘Hang on we’re coming,” the fog was pea soup. In a minute there were 30 Chautauquans yelling for this guy from the shore. Scott Lesley went and got his bugle. It took until 4:00 A.M. to get this guy in. Tom collapsed when he got back home.”

Thomas told me about growing up at the family home and being a kid here; coming up through the socialization process of clubs and jobs. About Mother Fitzwater coming across the lake in a rowboat with her father and Arthur Bestor who eventually became a long-term president of the Institution. But one of the things he was adamant about was getting to really *know the place* to “have a stake in the place”. “I know that path so well I could step over the tree roots in the dark.” He could single out events at the specific place where they transpired that were filled with meaning and memory. Basso:

As places animate the ideas and feelings of persons who attend to them, these same ideas and feelings animate the places on which attention has been bestowed, and the movements of this process—inward toward facets of the self, outward toward aspects of the external world, alternately both together—cannot be known in advance. When places are actively sensed, the physical landscape becomes wedded to the landscape of the mind, to the roving imagination, and where the latter may lead is anybody’s guess. [1996:107]



Fig. 2-8 Brass dedication plate on tree sold during Depression to raise funds.

This continuous give and take was apparent in his keenness about neighborhoods. This was where his sense of “homeness” came from; from what Fitzwater called “a common affection for Chautauqua”. People come back for different reasons. Neighborhoods all click as different and unique expressions of this place all with their own set of stories are “as important as everything else here”. The

Fitzwater neighborhood was intact; it was still made up of long-term families of old friends that

spend time together; of a different set of friends than they had back home. “Here it’s a constant; return and nothing’s changed. Friendships made here in many cases are longer term than those at home. We come here to see them.” The Fitzwater’s are core Chautauquans. They emphasized how their level of enthusiasm for Chautauqua increased with their level of involvement. Growing up here, being on boards, ushering at church, volunteering for Old First Night, being on task forces, being connected to other families through friendship and marriage all deepened their experience of Chautauqua. Their story was retold to me dozens of times and when multiplied by the thousands of Chautauquans over decades, it makes up a thick slice of the culture here. It was lived experience they took with them and cherished year round.²³

A kinship study at the Institution would be a valuable contribution to North American ethnography. And while I’m not volunteering just yet, I owe it to my kinship mentor F.K. Lehman to at least simulate interest. Hence, I think it appropriate to follow Thomas Fitzwater with some input from Mother Fitzwater.

Mother Rebecca Clark Fitzwater ‘s story, especially when it comes to historical depth, pulls together just about everything Chautauquan. Her father, a trustee, silversmith, jeweler, founder of a large company amateur arborist and early environmentalist: attended the very first Chautauqua camp meeting in 1874. Her mother started attending in 1876 and they built the family home in 1899. She was friend to Mina Miller Edison, son of co-founder Lewis Miller and second wife of inventor Thomas Edison. Just after her birth in New York City, where her father was launching his new brand of opera glasses, he planted the row of maple trees that run the length of Bestor Plaza.²⁴ They lived two doors down from co-founder John Vincent. Mother Fitzwater is a great grandmother, grandmother and mother of five children (one son Thomas cited above) who all come to the grounds annually. They were required to have jobs²⁵ on the

grounds as part of growing up here. Mother Fitzwater is a primary Chautauquan Brahmin with roots extending throughout the Institution.

Mother Fitzwater's view of the Institution reflects the core discourse of the place. "This is a family place. It gives us standards of living to go by. Friends; and friends equal family here. You hold a wedding in October, they will come." At 90 years old and having been coming to Chautauqua all her life, she was a lifetime member of the Chautauqua Literary and Scientific Circle and the Bird Tree and Garden Club. She recalls the Institution going into receivership during the Great Depression. To raise money: "We [symbolically] bought the seats in the Amphitheater and the trees along the streets." After her family moved to Chicago she met her husband through a friend in Evanston, IL: they honeymooned at Chautauqua. She remembers the grounds when Methodist tenets dictated that there was no dancing and "we pulled the shades to play cards". During World War II, "We had a house party and knitted sweaters and socks for the soldiers and my aunt didn't say a word about knitting on Sunday". Eventually things loosened up and dance lessons were taught at the Seaver gym.²⁶ By 1950 all five of her children had been born and they bought the current Fitzwater house on the lakefront for \$25,000. "We had outgrown my parents' home". Over the years she has seen Chautauqua grow; be threatened with extinction during the Depression; to watching Chautauqua suffer through the languor of the 1950's; and finally to be renewed with vitality from the 1970s onward. Three of her grandchildren have been married in the Hall of Philosophy. She summed the peace generated by the Chautauqua Experience as: "Friendliness plus respect for the rules makes for the pleasant feeling that binds. I can feel it flow into the house."

Harold Sandler can only afford short visits to Chautauqua, but his links are strongest through the stories of growing up on the grounds. It was almost as if he lived vicariously during

his recent visits through the power of his past. As a child he grew up in the center of things at the President's house. Now he is, "outside the loop, not a part of the social and cultural scene". Then, he met Henry Ford and shook hands with Franklin Roosevelt when he came to Chautauqua to deliver his "I Hate War" speech and listened to Norman Thomas tell ghost stories. One story that stood out was Eleanor Roosevelt's visit when he was 12 years old. "Eleanor had lunch at our house, cucumber salad, and Franklin phoned wanting to know what she was going to say. When he called, the maid got so flustered she hung up on him. [After he called back] they spoke for half an hour while she read her speech to him." Yet while Sandler has this incredible relationship to the Institution's past, he doesn't have strong relations with anyone here anymore. His link to the Institution is bitter sweet, he still visits and has a sister he sees here, but he relates to Chautauqua though the lens of the past.

Another way to relate to Chautauqua as place is not so much from the social, aesthetic or programmatic aspect, but from the economic. Alan Currie, a retired attorney from Buffalo, was concerned about the operations of the grounds and local politics. He was concerned "with the spalling sidewalk in front of the Post Office". When the utility district pulled up sewer or water lines he thought that they should bury the power and communications lines as well. As a property owner, Currie was concerned with the day-to-day operations of the grounds and whether work being done was efficient and cost effective. He attended the program, but in my interview, his story was more about financial pragmatism. He was especially concerned with taxation. The property values at the Institution had spiked over the last 25 years as the state reassessed property and the overall value of property rose along the lake and within the gate. As much as his past, Chautauqua represented Morris's future.

Currie's beef with the Chautauqua Central School District was legendary. The Institution is situated within three taxing entities: the State of New York, the Town of Chautauqua and the Chautauqua Central School District. The state and the town work together to set assessments and tax jointly and the school district uses those assessment numbers to levy its tax. Currie was a key figure in a group called the West Lake Citizens Council and followed the spending at the district closely. The Council members were concerned about the amount they were being taxed and the fact that they could not vote on the districts' budgets. The district regularly held its budget vote in January, the least likely month for Chautauquan's to be on the grounds and they did not have absentee ballots for property owners either in the Institution or available for the other vacation properties owners along or near Chautauqua Lake. It was taxation without representation. Currie's group was not as concerned with the Town of Chautauqua tax, as it only came to pennies per thousand of assessed value. This was because the state sales tax returned to the Town roughly 3 cents of every 7 cents in tax it acquired on the dollar and offset the need for high property taxes. Being a major tourist area, the Town of Chautauqua saw millions in returns. Chautauqua paid 75 percent of the taxes of the school district, one Currie argued was over funded. The school was composed of 480 students K-12 at a rough cost of \$10,500 per student, at the time roughly a third more per student than at neighboring districts. He met regularly with other property owners to rally their support and to attend school board meetings in mass to argue for more of a role in the decision-making. After rigorously fighting a school facility building project and winning, the school district eventually entered into a merger with Mayville four miles away and the county seat.²⁷ While the Institution's program, grounds and ambiance are a high priority, the place for Chautauquans like Currie is related to the value of the land, the efficiency of government and the administration, and the cost of maintaining their homes.

Interestingly, the overarching Chautauqua ideology of taking home that message about community engagement pales in the shadow of Curries' Chautauqua specific economic interests.

Today Chautauqua retains its genteel atmosphere, but the Institution is not as insulated from the outside world as it once was. It is not uncommon to find tattooed kids (and adults) dressed in black walking the grounds, indulging in alcohol and drug use, closeted micro-aggressive racism, and even engaging vicarious sex in the fountain late at night. There is a pervasive classism. Past employees have told me of various rude mistreatments by Chautauquans and having lived in the region for 20 years, I have seen many local towns' people shudder when the Chautauqua gate opens for the summer. The village of Mayville becomes inundated with discourteous Chautauquans who reserve their genteel behaviors for their time within the fence. The town-and-gown situation that exists between the Institution and the surrounding area is much like a university setting when town and gown fail to meet. The following letter expresses well the outrage felt by some residents.

To The Post-Journal

Why is the Gebbie Foundation granting Chautauqua Institution \$1.25 million for gate improvement? I find it ludicrous that an exclusive "club" that caters to the wealthy of Pittsburgh, Cleveland, Toronto, Buffalo and New York City would need money from a benevolent foundation to beautify its entrance way and parking lot. Most local residents can only afford to drive by and view the entranceway and parking lot. How will this grant help our community?

The institution charges \$3.25 for parking and three times that much to visit the grounds. I also understand that the tax rate within the institution is astronomical. Weekly and seasonal gate passes range in the hundreds of dollars. Ticket prices for functions are costly and on par with private theaters and concert rates. Where does this money go?

I'm shocked that two of the requirements the institution had to meet to receive the grant were to eliminate deficit operations and develop an operating reserve. A sound organization would do this regardless of arm-twisting by the Gebbie Foundation. How about making the institution more accessible to local residents? How about some joint operations or shared talent during the season with the Reg Lenna Civic Center or Lucille

Ball Theater? How about summer youth camp discount and reserved music scholarships for local children with promise?

The article announced, ". . . the foundation's generosity . . . will permit a serious reorientation of Chautauqua's relationship with the community" Why must we purchase good standing with the institution for \$1.25 million?

Finally, to add insult to injury, the Gebbie Foundation announced a grant of \$25,000 for seed money for a Chautauqua County childcare scholarship fund. \$1.25 million to the institution versus \$25,000 for county children . . . what's wrong with this picture?

Tom Geisler

West Ellicott

June 22, 1996 (Opening day of the 96 Chautauqua Season)

The price for sanctuary is high: property is expensive and taxes have skyrocketed since the 1960s; living there and running the Institution is expensive. Catherine Donley noted that many of the old-time Chautauquans: ministers, teachers, the "little old ladies in tennis shoes", have been out-priced completely or are limited to very short stays. "People



Fig. 2-9 Catholic House, Benson ©

used to stay for the whole season regardless of income, now it's down to about a week". Real estate is expensive; living there is expensive, running the Institution is expensive. Yet Chautauqua thrives in its programming and the numbers of visitors and is expanding at record rates. Chautauqua's past President Daniel Bratton called the Institution "Recession Proof". Finance Committee chair Douglas Prichard said, "As long as the Institution can maintain its identity, be true to itself as an oasis of values, it will remain sound".

Chautauqua was historically a homogeneous WASP enclave that shielded itself from Jews, Catholics, and people of color, through various forms of subtle or not so subtle discrimination. Over the last 30 years both Catholics and Jews have come to positions of power on the Board of Trustees and have become substantial donors to the Institution's coffers. A prominent Jewish Chautauquan remembers stating, "I'll contribute when they get a Jew on the Board". The Jewish population at the time of the study made up to 25 percent of the people on the grounds (Epstein 2009:43). People of color are still most dramatically under-represented; at the time of my study there was only one African-American property owner.

Tensions have arisen among groups and this culminated in the summer of 1994 in accusations of anti-Semitism toward an organization called Chautauquans for a Christian Focus (CFCF). There are also disputes between old Chautauqua families and the administration that focus on the pace of change: many patrons preferred the quiet, lazy, community on the lake to the bustling, richly programmed and scheduled place of today. The complainants find fault with the condos, noisy bus tours, high taxes, increased numbers on the grounds, and the constant barrage of philanthropic requests. At least two old families have pulled substantial financial support in order to make their point. One family pulled its annual support because of Bill Clinton's visit. Not all Chautauquans are liberals.

All donors, despite their ethnic or religious affiliations, do agree that they want to preserve the safety as well as the pedestrian, pedagogical nature of the Institution. Catherine Dickson says, "It's a matter of loyalty". No one can live this kind of life anywhere else. To preserve the Chautauqua they love, they have to pay for it. Recent successful capital campaigns exceeding established goals demonstrate that they are doing just that.

Demographics at Time of Study

The Chautauqua program is designed to meet the demands of people who desire intellectual stimulation, who have an interest in personal growth and who have a pledged openness to new people and ideas. Chautauquans of the 1990s are generally well educated, 90 percent with at least one college degree, the mean being a Bachelors degree, many with Masters (NAM 1998:15). Seventy percent of Chautauquans are from outside of Chautauqua County: other parts of New York, Pennsylvania, Ohio and the rest are predominantly from the southern Atlantic States and Texas. The average party size was two point eight. Short duration ticket purchases made up the majority of ticket sales. The average stay on the grounds was three point eight nights but the duration of stay varies per type of visitor: season pass holders stayed an average of sixty-one nights, two-to-eight week pass holders stayed eighteen nights, three-day-to-two week pass holders, six nights and one-to-two day pass holders, less than one night. The majority of ticket holders are seniors and seniors are disproportionately represented when compared to national averages, younger groups up to the age of forty-five are under-represented. George Henderson, past Board member said, "This used to be the place where old folks come and bring their parents. Now we see the Children's school flooded, the problem is most of the kids are from wealthy families". His observation reveals the developing social cleavage between some of the new wealthier members and more traditional Chautauquans. The complaint being that the younger members of the older Chautauqua families are finding it harder to afford to come because the place is so expensive while newer affluent families have little trouble with costs. Seventy-six percent of households have annual incomes of more than \$50,000, and thirty-seven percent have incomes over \$100,000 (NAM 1998).

As outlined above, Chautauquans come to the Institution for a variety of personal reasons and for an ambiance or “feel” of the Institution that they themselves create and reproduce (Basso 1996:75; NAM 1998). Chautauquans thrive on the opportunity to continue learning in an interactive environment. The Disney Corporation, at the behest of Michael Eisner, conducted a study of the Institution (Decision Research Corp:1991).²⁸ The study was in pursuit of information that Disney might use to reproduce the key elements that made Chautauqua so valuable to its constituents. The study was more a marketing analysis than an ethnographic product. It detailed average education, income, interests, backgrounds, professions and a summary of focus groups and their perspectives of Chautauqua. Disney sought to design its own version of the Institution by incorporating many of the wholesome and education themes in its Disney Institute.²⁹ The Institute has undergone a number of changes since it was established. It could not reproduce the Chautauquan dynamic of place that makes the Institution so valuable to its participants: family, historical roots, property, and programming. Instead the Disney Institute once it acknowledged that it could not package the “feel” of Chautauqua branched out and provided business retreats and core business training³⁰ rather than art and culture. The study did say: “Many Chautauquans believe the most interesting part of the lectures they attend are the question-and-answer sessions or the informal discussion groups that frequently follow. At these times, visitors are able to truly stretch intellectually and challenge themselves as they jointly explore ideas, theories and perspectives” (Disney Study 1991:8).

Chautauquas claim to have a relaxed social style. They claim to be less concerned with appearance than substance. Clothing and other common material signs of social status carry little weight with Chautauquans, at least while they are at Chautauqua. Visitors can achieve status in the “community” more through involvement in lectures, by performing, or possessing a unique or interesting skill, than by appearance. This rejection of a social status of hierarchy within the community is possibly due to a desire on the part of the Chautauquans to break out of the traditional roles they experience at home in order to

mix and learn from people regardless of wealth, education, age or any other social constraints which exist in everyday society. Furthermore, the sense of personal security engendered by Chautauqua is such that visitors are encouraged to be themselves and drop the defensiveness required of everyday living. This, in turn, contributes to the relaxation felt by so many Chautauquans. [Disney Study 1991:10]

I found that in general Chautauquans hold values that respect tradition, nature, family, religion, art, history, and civic duty. There is also a profound sense of order inculcated in “the rules.” The program and social schedule combine to form a richly dedicated form of daily life. The various “rituals” of Old First Night, the graduation ceremonies of the Chautauqua Literary and Scientific Circle, the opening ceremony of the “Three Taps of the Gavel”³¹ and the weekly Sunday evening “Sacred Song” service are staples of Chautauqua’s traditions. The tree lined streets, the maintained parks and homes; the lakefront and natural areas all reflect a commitment to the natural environment. Multi-generational family is a social marker as well as source of pride and tradition at the Institution. And the preponderance of older adults reinforces the feeling of tradition. Religious experiences and spiritual values are important as religious programming takes over a quarter of the season’s events. The arts that range from performing to static are also respected. Overall, Chautauquans tend to be liberal minded, politically active, reasonably tolerant (although there are schisms), well-rounded people of means who come to the Institution to expend mental energy and navigate new realms of intellectual, artistic, religious, and family experiences. Leonard Madson who has been coming to the Institution every year since 1924 sees Chautauqua, “as an island in the midst of chaos”. Lydia Kranz calls Chautauqua another “Camelot” where conservation applies to ‘lifestyle’ versus an ecological environment. John Cavins a long term property owner and Board member said, “Chautauqua is an intangible thing . . . there’s something about Chautauqua . . . When I’m here, I’m a better person. There’s a sense of community here that’s holistic and it depends on me to *want* to be part of this place.”

Chris Redman:

Chautauqua is nothing without the people who frequent the place, attend the programs, and frequently find themselves helping to build and continue Chautauqua through clubs and activities. . . . The *Daily* [Chautauqua's heavily spun in-house newspaper] has defined a Chautauquan - for purposes of explaining who will be covered in its pages - as anyone who has spent at least two days at Chautauqua.

But there is more to it than that, else the pride some people display in being "third-generation Chautauquans" would hardly be so great. The celebrations at Old First Night [the annual ceremony of plays, recognition and fund raising] give a clue, as old-timers are honored for the number of years they have spent time at Chautauqua and the number of generations of their ancestors who did so before them. At the same time, Old First Night includes a moment to honor and welcome those on their first visit, and it is made clear that everyone knows they will be coming back again. They are far different from the visitors who drop in by bus for an evening to attend a special.

It does seem that some Chautauquans are more equal than others. To begin with, there are a few hundred year-round residents, who are equally happy to see the summer Chautauquans arrive and to see them depart again. Beyond that, the "real" Chautauquans, in some eyes at least, are the property owners, both because their financial support is great (if not entirely willing) and because their tie to a cottage implies a permanent commitment to Chautauqua itself.

But there are other people who come year after year, perhaps season long, and stay in the same accommodation as renters. One of Chautauqua's imperfections is that such people have no formal role in governance, no guaranteed influence as members (rather than as customers) on program or planning. And it does not take long for a newcomer to wish to feel at home, accepting Chautauqua's little ways and happily giving directions to newer arrivals. Beyond the number of years someone has been coming, status can be derived from the length of one's stay, and season-long Chautauquans are not only more at home, but more able to take part in many aspects of the program, such as organized sports, than are shorter-term visitors.

Chautauqua is for certain kinds of people and an uncomfortable question is whether there are requirements for race and religion. One sees a few blacks on Chautauqua's pathways, but not many. One is aware that there are Catholics, but most Chautauquans are Protestant; still more forcibly, there are occasional hints of tension between the Christian majority and the Jewish minority. The Chautauqua Challenge makes it clear that Chautauqua is for all who share its purposes. "I bridle," says [then] Chautauqua president Dan Bratton, "when I hear of 'true Chautauquans.' It's a dangerous concept because it tries to portray a given set of personal characteristics as encompassing Chautauqua. Chautauqua is beyond and above anyone, group or age." [Redmond unpublished manuscript]

Race and Ethnicity

Chautauqua is ethnically a very white place and always has been. There are very few African Americans visiting Chautauqua as participants and the same can be said for Asians or Hispanics. The demographics of those attending Chautauqua reflect the ethnicity of the general white suburban population who make up the Chautauqua constituency. Looking through the majority of photographs from 1874 to the present indicates that this has historical validity as well. Yet, many people of color are invited either to lecture or to perform. Looking more closely at this quality of Chautauqua allows for a deeper understanding of the sense of belonging nurtured by the institution and its majority attendees.

Historically the Institution has been white and even segregated. A Mrs. Bierly in 1936 brought her three laundresses, four utility men and several chambermaids, all African Americans with her from Florida (Simpson 1999:90-91). Jeffery Simpson writes on conservative conditions at the Institution in the 1950s after Thurgood Marshall had given a speech as a legal officer of the NAACP:

One indication of this is that while such black leaders as Marshall and Ralph Bunche, a winner of the Nobel Peace Prize, were speaking on the Amphitheater platform, until the mid-1960s Chautauqua maintained a separate rooming house for the African-American help imported from a women's college in North Carolina. The building where personal domestic servants of summer residents also boarded, was called the Phillis Wheatley Cottage, names with unintentional irony for an eighteenth-century Boston slave who was freed, learned to read, and became a poet. Generally the appearance of the Grounds in these years became a subtle metaphor for the state of the Institution. Victorian cottages that had been a subtle rainbow of colors when they were new *slowly all turned to white*. [emphasis added: Simpson 1999:94]

Over the course of the century some of the initial values of openness and tolerance were eroding. I was told that segregation by gender was enforced for visitors of color at one time, even between married couples of nonwhite race. An African American minister was to speak at the Amphitheater in the 1940s and he and his wife were separated for fear of any noisy embarrassing sexual relations they might pursue.

Harvard historian Theodore Morrison was commissioned to write the history of Chautauqua for the bicentennial in 1974. He compiled his account primarily from articles written in the Institution's newspaper, *The Chautauqua Daily*. In that record he sites various discussions of race in the program.

- 1917: Major Robert B. Morton, principal of Tuskegee Institute, Alabama spoke in the Amphitheater on his ideas on the possibilities "for the white race and black race to live together in peace and harmony" (Morris 1974:96).
- 1925: President Arthur E. Bestor gave an address titled "Race Solidarity": "... if white nations do not stop trying to wipe each other out ... the black peoples of the earth may grip the torch of civilization from [their] faltering hands" (Morris 1974:100).
- 1948: Stringfellow Barr, President of the Foundation for World Governments commented on the rise of Third World nations (Morris 1974:198).
- 1957: Three years after the *Brown v. Board of Education* Topeka decision to desegregate schools, Thurgood Marshall then of the Legal Affairs office of the NAACP came and spoke at Chautauqua. The platform focused on school integration and hosted a number of speakers on civil rights. Morris notes, "The attention may seem somewhat overdone" (Morris 1974:208).
- 1963: The platform dedicated a week to civil rights (Morris 1974:216).
- 1965: Dr. Clarence Jordan spoke on the racial aspects of the Vietnam War, as in more people of color being attached.
- 1966: Samuel D. Proctor, African American Director of the Institute for the Services to Education spoke on "breaking the Poverty Cycle" (Morris 1974:216).
- 1967: Governor George Romney of Michigan, "We welcome you to a riotless Chautauqua." He spoke on poverty in United States cities and attacked Stokely Carmichael, principle founder of the Black Power movement, for advocating guerilla warfare in American cities. For this he "drew a tumultuous applause" (Morrison 1974:216-217).

The Amphitheater platform continues to address civil rights issues and issues of race until the present day. But while the platform reflected the racial concerns of the nation, the audience did and still does not; a pervasive characteristic of Chautauqua itself. Perhaps despite the ideological differences that are represented among Chautauquans, racial diversity and the racial unrest and inequality it indexes for some do not fit the picture of a utopian community. A vision of a multicultural, multiracial democratic community has not permeated the practices on the grounds of Chautauqua despite the presence of luminaries of all backgrounds. The gate provides safety

for a more homogeneous population to hide behind while it studies and discusses the world. People of color are an anomaly at Chautauqua. Just as an example, I spoke with an Asian lecturer who was aghast at being “stared at” as she walked the grounds.

Issue of race and ethnicity concerned many of the Chautauquans I interviewed. Responses ranged from genuine concern that Chautauqua would be forever troubled by unequal representation in its resident population to those who expressed prejudiced views.

Richard Miller, great-grandson of Chautauqua co-founder Lewis Miller and at the time of the interview President of the Chautauqua Foundation stated that:

“We are not appropriately reflective of the socioeconomic mix in society of our racial heritage assets. It is definitely a [pause] at least a WASP, maybe not WASP but WASP community anyway. There are still Jewish tensions. I think that that’s largely generational and dying out quite quickly. There are now Jewish people on the Board of Trustees. There are Jewish people on the Foundation Board. They are very active in lots of roles around the community. I don’t think that’s any longer a social problem. But, definitely the minorities: Black, Asian, Hispanic, are very rare. And I guess my own view of that is we’re not going to be able to socially engineer that. I think that we’re going to have to be assiduous in terms of exposing ourselves where those kinds of people are: in church groups, in educational structure, in various kinds of professional associations, and logical places where people that we would like to be able to attract already find themselves comfortable. And we have to be sufficiently patient to wait for that to happen naturally. I think we have to be more encouraging . . . It’s something we haven’t successfully thought enough about as far as our marketing strategy.”

Miller exemplifies much of the thinking on race at Chautauqua. My encounters with African Americans were few and far between. Their numbers are growing, but they are underrepresented.³² Chautauqua generally reflects the populations of middle, upper-middle, and upper class suburbs. There is an uncomfortable feel in discussing the topic of race entailing a history of inequality and oppression that violate the progressive ideology of many Chautauquans. When we talked about race there was a uneasy heaviness on the use of the word “them” indexing unfamiliarity and otherness. Chautauqua, to those with whom I spoke, is a place owned by its

visitors where a lifestyle and associated cultural heritage presumed by visitors to be “ours” is protected (Gupta and Ferguson 1997:4).

While the Jewish Christian dynamic is unique, in the summer of 1993 there was an event that triggered many discussions on anti-Semitism, and that holds some insight into the issues of race for Chautauqua. The



Fig 2-10. The Chautauquan Daily, August 8, 1993 Volume CXVI, Issue 37

Chautauquans for a Christian Focus (CFCF) invited a Christian youth group called “Student Venture” back for a second summer of activities serving high school age Chautauquans. They rented a house and hosted a number of gatherings and game nights. On the night prior to David McCullough’s very important and very public “Chautauqua Lecture”, a lecture done annually by a prominent historian or figure; the Christian group had an ad published in the Chautauqua Daily. The ad announced a Sunday night game called “Gestapo Night” that was basically hide-and-seek played in dark clothing with flashlights.³³ Antagonism had been simmering between certain groups and the Chautauqua Jewish community for some time and this became a catalyst. I was actively conducting fieldwork when the ad hit the paper and the whole thing blew up into a ferocious controversy (Epstein 2009:46). Then President Bratton publicly apologized for the ad and to the Jewish friends who were offended by it before introducing McCullough to a completely packed Amphitheatre at the 10:45 lecture. Conversations were hot on the streets and a number of meetings and discussions were organized. The banner in front of the Student Venture house was slit down the middle in an unprecedented act of reprisal.

I spoke with a Jewish Chautauquan during the controversy who said, “Chautauqua is a fairyland. Every place has its bit of ugliness.” She had never felt uneasy here and had spent time in a number of the denominational houses. “Most people here are live and let live. The overwhelming percentage of Jews wish to be left alone and don’t want to make waves, and yet this [anti-Semitism] follows us here.”

One group met with the administration to address the problem of rising anti-Semitic remarks. Another group met at the Hall Of Missions for a talk about the “Gestapo Night” controversy. One of the more caustic events centered on an anti-ACLU film sponsored by the CFCF. A young Jewish man Joseph Denk and his father attended the event. After the showing the film a member of the CFCF wearing a large wooden cross around his neck came up and said “we don’t like your kind around here.” Denk responded “well we like your kind around here and you’re welcome in my house anytime.”



Fig 2-11 Everett Center, © 2010

A series of stories circulated, but ultimately the event was a therapeutic means for the many in the community to converse and air feelings on both sides. Richard Miller a prominent Chautauquan noted that the negative reaction to the event indicated a cultural awareness and sensitivity reflecting a shared set of values and orientations where this type of thing is unacceptable. Since that time and I have maintained contacts with folks at the Institution, I have not heard of any serious unrest. If anything there is a reversal of the trend as the Chautauqua’s Christian-Jewish dialogue has expanded in the last decade to include a new set of programs titled “Chautauqua Abrahamic”³⁴ and the building of an extensive new facility on the grounds called the Everett

Jewish Life Center³⁵ where programs take place and housing is available for visitors and Rabbis. Of note is the Center is hardly in the center of the Institution, it was built on the margin of the grounds into the north parking lot, a physical manifestation of the incomplete integration process. The turbulence of the 1990s and earlier has smoothed out and the relationships between the Christian and Jewish community are well established and growing. It is an affirmation of what Richard Miller stated above on assimilation, “. . . we have to be sufficiently patient to wait for that to happen naturally”.

Another Chautauquan provides a different point of view. Her story isn't a falsification of the others, but offers a vantage point that sets off an important contrast. In the interests of confidentiality I will not say anything about her position, save for the fact that she spent two seasons at the Institution and said she would never return. She is not, nor ever was, a property owner. She was an African-American who had come to know a good many Chautauquans and concluded there was a great deal of “playing aristocrat” going on. Basically the middle-class, when they come to Chautauqua, they are transformed into Victorians with all the baggage that comes with that vitriolic persona. Much of the snobbery and arrogance that is associated with Victorian society finds a subdued stage at Chautauqua. Chautauquans, as do many tourists, expect to be served and the staff ends up feeling subservient if not rebellious. She recognized there were few contradictory elements [people] on the grounds: African-Americans, Hispanics, the poor, and few disabled. “It's a highly constructed universe.” The gate is a ritual and physical social barrier. People come, whether they acknowledge all of this or not, to feel the security of being in a place they can construct as relatively homogeneous by class and color.

She had made many friends and was not totally disillusioned with Chautauqua. She said that the racism was subtle. At parties and social gatherings she was usually the only African-

American present. This led to the “white guilt stories” where the persons she was talking to would bring up “their Black story”. This was a story about someone they had met who was an African-American who they had some form of interaction. They would tell her this story as a way to show “they were not racists”. This happened repeatedly.

Another way she felt the presence of racism was in the subtle ways she sensed she made Chautauquans uncomfortable. She said she “felt watched”. As if she was such an anomaly that people couldn’t help but take notice of her blackness. An example she told me this story as an example of how subtle the racism could be:

“I’d be walking down the brick walk, and I’d catch the eye of someone I knew and they’d very quickly turn away as if they really hadn’t seen me. One time I saw a “friend” working in her garden. I know she saw me coming, but just buried her head in her garden and didn’t turn around.” She said there was no way to call anybody on these acts because they could be construed as normal behavior. Not everyone recognizes everyone they see, especially if they are just acquaintances, but the repetition of these microaggressive acts made it clear to her they were not coincidences. She made Chautauquans uncomfortable.

Her story is important because it illuminates the inverse of what makes Chautauquans so comfortable. At some important level, the absence of ethnic diversity in this space adds to the security of the place. Reflecting white America, in Chautauqua “Others” still generate feelings of threat. Contrasting her story to those who call Chautauqua their “emotional home”, it speaks to the general white population here and the latent ideas of race that largely remain unspoken on the grounds.

Conclusion

Chautauqua as a place and as an experience is significant to those contributors who make up the support base of the Institution. There are numerous publications on the Institution, and the Chautauqua archives have numerous letters, journals and reminiscences that reveal many personal records about the place. There have been a number of books written on Chautauqua (Bratton n.d.; Camper 1984; Case and Case 1948; Cram 1990; Gentile 1989; Glick 1984; Gould, 1961; Horner 1954; Hurlbut, 1921; Irwin, 1987; Morrison, 1974; Remick 1974; Redmond n.d.; Rieser 2003; Richmond 1943; Schlereth 1984; Simpson 1972, 1999). Google Books is an excellent site for many of the early works. There are a host of travelogues and articles written on it as well. I build on these documents in this chapter and what follows to address aspects of the dynamics of Chautauqua that support a robust philanthropic community.

In the next chapter I begin this work by addressing historic antecedents and the overall development of the Institution with an emphasis on the history of giving at Chautauqua.

Chapter 3

Certain Antecedents to Chautauqua Institution and a Sketch of the Philanthropic History from 1874 to 1990

Few institutions exist which can so well serve America's most acute need—the need for more men and women of keen intelligence and of moral character. Few investments can compare in potential productive power with the philanthropic investments which will preserve and strengthen Chautauqua. [The Flag of Truce, Chautauqua Publication 1935:7]

Chautauqua began in the summer of 1874 as "The Chautauqua Sunday School Assembly" to educate Sunday school teachers "with the purpose of improving methods of biblical instruction in the Sunday school and in the family" (Irwin 1987:12, 1996; Morrison 1974:31; Simpson 1999:31-43; Vincent 1886:16-18). Chautauqua was and remains dedicated to the cross pollination of education, religion, art, and recreation. Its founders believed an individual with a well-rounded education could best carry on both a productive material and spiritual life. The rise of the middle class, social movements sparked by changes in American Christianity and the Industrial Revolution were among the historical antecedents that contributed to the formation of Chautauqua (Hatch 1989; Smith 1984). Andrew Rieser writes that there was a historical moment for:

--the Chautauqua Movement -- in which powerful political, religious, intellectual, and economic forces collided to create a unique institution. Chautauqua was neither a college nor a summer resort nor a religious assembly. It was however a composite of all of these, completely derivative yet brilliantly innovative. A close examination of the Chautauqua Movement, I suggest, will help us better understand the contested hegemony of a demographic whose exercise of authority, submerged in the murky waters of the mainstream, often escapes detection: the native-born, white, Protestant middle classes. It will also help us understand the rise of modern liberalism, the new way of envisioning an individual's relationship to society that began to take hold among middling sorts after the Civil War. [Rieser 2003:5]³⁶

19th century America experienced an explosion of cultural growth. Propelling that explosion were the powers of religion, education, immigration, capital, class, and populism. Chautauqua capitalized on them all.

Antecedents

The seeds of what was to become the middle class in America were planted in the 18th and 19th century. Chautauqua was a result of this rise of the white middle class that was in turn the result of a number of movements in American culture. Chautauqua's beginnings can be attributed to the democratization and popularization of American Christianity, the rise and evolution of revivalism, the enormous expansion of publications and printing presses, the rise of new Protestant sects, the post Civil War rise of liberalism, the Industrial Revolution, mass immigration, the struggle between labor and capital, Farmers Revolt, the western expansion, shifts in the sphere of education, American Victorianism, and the institutionalization of Methodism and its clergy (Smith 1984).

The following summary is drawn from Nathan Hatch's *The Democratization of American Christianity* (1984); Andrew Rieser's *The Chautauqua Moment: Protestants, Progressives, and the Culture of Modern Liberalism*; and, Page Smith's *The Rise of Industrial America: A People's History of the Post-Reconstructionist Era* (1984). Tracking the religious underpinnings of Chautauqua is



Fig. 3-1 Religious Camp Meeting 1839 Library of Congress

only one of many possible ways to look at the antecedents of the movement. It could not have come about without the list in the last paragraph's conditions. Each could be a dissertation in its own right. It was Andrew Rieser who supported the deep religious convictions of the rising middle class who formed Chautauqua (Rieser 2003:10). He quotes Theodore Morrison: "Only an encyclopedia with an ample corps of contributors, could trace in full the local and cultural history" of Chautauqua's myriad offshoots (Rieser 2003:2; Morrison 1974:163).

Western New York is the site of much of the "burned-over district" where a number of major Christian sects and utopian communities were born. Whitney Cross refers to the term coined by evangelist Charles Grandison Finney in his *The Burned-over District: The Social and Intellectual History of Enthusiastic Religion in Western New York, 1800-1850*. Marked by various expressions of religious ecstasy, celibacy and revival; burned-over refers to those who after living through years of intense religious experience were left exhausted and wrought with a sense of loss.³⁷ The period was marked by the rise of Mormonism, the Shakers, the Oneida Community, Spiritualism and the Fox Sisters, numerous communal utopian experiments, benevolent societies and years of revivals.³⁸ Rieser:

Seeking to explain its germination there, commentators often compared Chautauqua to the settlements of religious dissenters and utopians dotting central and western New York throughout the nineteenth century, such as the Mormons, Oneida communitarians, German communists, evangelical revivalists, and Lily Dale Spiritualists. By this reading, Chautauqua was the latest perturbation in a long line of religious awakenings. The revivals followed waves of western-migrating New Englanders as they moved beyond the Mohawk River Valley along the Erie Canal from Albany to Buffalo and beyond. The effort to reconcile the contradictions of the new social experiences, linked with the economic dislocations of the Erie Canal, uprooted them from the old ways and unleashed a spiritual creativity manifested in unorthodox beliefs, lifestyles, and patterns of governance. The success of the circuit-riding preachers in particular, gave the region its reputation as the "burned-over district". [2003:15]

The Methodists

Methodism was by and large a reaction to elitist tenets of predestination and the social hierarchy crystallized within Protestant denominations. It represented a historical force that

valued the layperson's personal experience and interpretation of the Bible. Francis Asbury, the founding father of American Methodism, because of a personal spiritual revelation Asbury experienced in 1738, believed and preached that everyone and anyone was equally open to the redemptive powers of scripture and to a personal experience of salvation. He advocated the general movement away from elitism, predestination and the highly structured social order within certain denominations.

Briefly, this Asburian Methodism was rooted in four basic tenets: the first two, universal redemption and unified sanctification, discarded ideas of predestination and the conception of God's chosen few. The second of two tenets, "fellowship of believers" and "Christian service", advocated action on behalf of the faithful (Hatch 1989:81-91).

Largely in reaction to the staunch and exclusive elitism of the Presbyterians and Episcopalians, budding Methodists did not consider wealth, power, or being a member of the clergy as evidence of God's grace. Those ascribing to predestination believed that a chosen few enjoyed God's grace evidenced by social position or a formal relation to a church. Early Methodists advocated that any individual who approached God, fueled by his own willingness to submit to God's will and to experience the rapture of the scriptures, could have and maintain legitimate and enriching religious experiences. Everyone was capable of perfection, redemption and salvation. Practicing this "method" in early Methodism reduced the need for clergy and undermined predestination (Hatch 1989:174, 177).

The "fellowship of believers" tenet of Methodism advocated that any people who held the same faith in the power of the scriptures could gather together at any time and share the sacraments of bread and wine, the body and blood of Christ. There was no need for specially trained clergymen to guide gatherings or to distribute the sacraments. The remaining tenet demanded Christian service. It called upon believers to help their fellows in any way they saw fit. Service could mean anything from proselytizing to providing food, shelter or finance (Hatch 1989:81-93).

Francis Asbury and George Whitfield, students and friends of John Wesley founder of Methodism in England, brought Methodism to America where it found a fertile niche. The combination of the American Revolution, neophyte democracy, and Jeffersonian ideals of individual autonomy and economic and educational growth, gave Methodism's idealism a place to grow. By the early to mid-19th century, Methodism gained popularity by being carried along with westward expansionism and propagated by the ever-increasing use of the printing press. It took on its own kind of American quintessence through the promotion by lay preachers from a wide range of backgrounds that took to the roads spreading the "Word" (Hatch 1989:11, 70, 73-76, 93-97, 125-126, 141-146).

Early Methodism held contempt for organized and formally trained clergy. This training and socialization, as it was believed, warped and distorted God's message. Some went so far as to call those institutions and the practitioners of "priestcraft" agents of Satan. The democratization of Christianity took hold of early 19th century American life and grew at an exhilarating rate. Churches of the most modest means (large elaborate churches were considered ostentatious and elitist) sprung up in small hamlets, towns and villages. These churches were Spartan in decor, their straight back seats hard and intentionally uncomfortable, contained no altar or formal adornment. Preachers sprung up from farms, blacksmith shops, schools, and any number of lay occupations. One only had to have heard the "calling" to go out and preach (Hatch 1989:167-170).

Lorenzo Dow was probably one of the most famous of the early road preachers.³⁹ He was credited with riding tens of thousands of miles over the course of his preaching career of camp revivals.

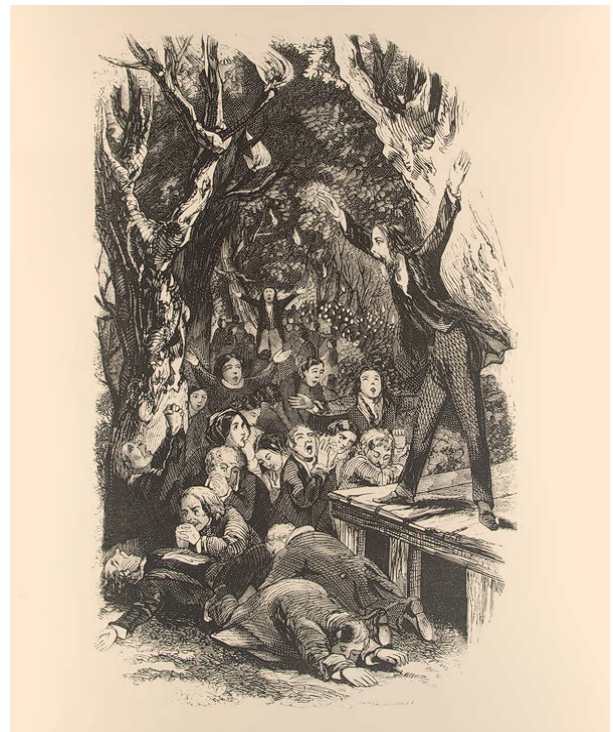


Fig. 3-2 Lorenzo Dow Camp Meeting Library of Congress

The revivals stressed the autonomy of each individual's direct experience of God. The common language of the rural people was used in combination with anecdotes, singing and stinging sermons that brought meetings to a fever pitch of ecstatic spiritual experience. Participants were known to writhe in their seats, roll on the ground, speak in tongues, testify in front of the audience and to raise an overall revivalist ruckus (Hatch 1989:133-138).⁴⁰ The camp meeting became a means for proselytizing, keeping church people working, and networked groups together as the circuit riders went from camp to camp. And for the Methodists: "The system mobilized the lay volunteers while ensuring that preachers would retain their franchise on Methodism" (Rieser 2003:21).

Hatch sees the democratization of early American Christianity in three respects. The first was redefining the leadership of the clergy. The established church leadership no longer held the reins on the interpretation or proselytization of spiritual matters. Religious interpretation was now available to lay people over elites and reflected the values and priorities of ordinary people. Second, as these movements empowered ordinary people, they defined faith for themselves rather than through the lens of doctrine. This religious landscape is populated with visions, dreams, signs, wonders and a general increase in gnostic supernatural activity in daily life. "Volatile aspects of popular religion, long held in check by the church, were recognized and encouraged from the pulpit" (Hatch 1989:10). Lastly, democracy fueled the passionate and confident dreams of a new age of religious and social harmony. The newly empowered laity was set on emergent qualities of equality and hope that overthrew the orthodox religious structures of the time. Christianity became a liberating force: "people were given the right to think and act for themselves rather than depending upon the mediations of an educated elite" (Hatch 1989:11). Democracy, religious democracy, is a powerful centrifugal social force responsible for a great deal of cultural change in 19th century America (Hatch 1989:9-11).

Conducive to the spread of religious ideas was the printing press. These presses were the sole technology behind spreading countless pamphlets, booklets, books, posters and newspapers to settlers throughout western states and territories. Preachers had the ability to individualize

their points of view in print and then disperse them to thousands of people. Hatch and Smith note that literally millions of these tracts flooded communities.⁴¹ As denominations began to crystallize into structured organizations, they opened their own publishing houses and distribution centers. Religious democracy with its presses rolling proselytized right alongside the western expansion (Hatch 1989:11, 70, 73-76, 125-126, 141-146; Smith 1984:797).

By the 1840s many of the groups that had been disorganized assemblages of like-minded believers began solidifying into organized flocks. Within Methodism and under the specific guidance of Nathan Bangs, churches were built that contained what would have been considered



Fig 3-3 Family handing out tracts, 1825. Library of Congress

sacrilegious luxuries in the origin days. Institutions for the training of a clergy rejected in early Methodism now emerged and colleges and institutions of higher learning were organized (Hatch 1989:147, 195, 201-206). This rise of authoritative forms of governance led many to remove themselves from mainstream Methodism and create sects of their own. Alongside the Methodist movement grew the Baptists, the Mormons, the Christian Abolitionists, Fundamentalists and other sects of Protestantism that followed very similar tenets (Hatch 1989:167-170; Smith 1983:284). These new denominations created institutions and colleges for training their clergy and for educating the lay public. Before, during, and after the Civil War these denominations tailored themselves to niches in the country, town and city, ethnicity and race, and to the differing cultures of the north and south and west (Hatch 1989:82-85, 93-95, 102-103; 115-122). Importantly to this story, Sunday school teachers were taking on an increased responsibility in the education of their congregations.

Religion was intimately tied with daily life, the structure of these budding communities, and was a measuring rod for moral and civic behavior. Churches were usually one of the first

buildings built, not ignoring the taverns, but the church tended to be the focal point for social life as well as spiritual direction. Methodism evolved a theological practice that was intimately involved with the work ethic and the growth of the middle class. Dance, music, drink, gambling, and many games were frowned upon because they were distractions from the spiritual life, and because they kept one from being a productive worker. Education was becoming more and more important to these believers as it furthered the productive value of their lives as it deepened their understanding of Creation and helped them better their conditions of living.

Enter Chautauqua

The common denominator to all of these groups, and of Methodists in particular, was the increasing interest in the education of their children. The one room school houses provided the educational basics, but the consensus was that the sole means for bettering their lives was through bettering themselves. No longer was Sunday school seen solely as a place to learn the depth and breadth of the Bible. Sunday Schools were taking on the job of enhancing an education that provided the means for children to live better lives than their parents (Smith 1984:608-611).

Seeking to fulfill personal dreams and to address a growing need at both the secular and profane levels, enter the Methodist Reverend John Heyl Vincent and Ohioan entrepreneur Lewis Miller. The method in Vincent's Methodism was one where the Bible's descriptions of the universe could be better understood with a well-rounded education in science, history, literature, the arts, that would enhance and supplement the scriptures (Morrison 1974:16-21; Vincent 1886:1-15). Miller's interests spanned from inventing farm equipment, to new classroom designs, to funding colleges, to the consistent improvement of Sunday schools (Irwin 1987:ix; Morrison 1974:21-26). Thomas Edison, Miller's son-in-law who married his daughter Ida, wrote of him that "he seemed to eternally make money in his factory to enable him to better carry on his schemes for education" (in Morrison 1974:26). Jeffrey Simpson writes:

Letters were sent out, and 142 Sunday-school teachers came from twenty-five states, Canada, Ireland, Scotland, and India –from every corner of the Methodist world and its mission fields—to attend classes, which were held in four tents set in the grove of trees by the lakeshore. On that evening, August 4, 1874, the two-week program of lectures and sermons opened with the singing of “Nearer My God to Thee” and various Scripture readings, beginning with “the day goeth away . . .” (Jeremiah 6:4), as in the light of the pine-knot torches flaring in boxes of dirt an incredible two thousand people sat jammed on log benches, swatting mosquitoes coming up from the lake in the August dusk. By August 12 an estimated ten to fifteen thousand people had flocked, walked, and sailed to the grounds to hear a particularly popular preacher, T. Dewitt Talmadge. It rained a lot those first seventeen days, but people just put up their umbrellas and stayed on, wading through the muck after each lecture to dripping tents, where they lodged and ate, or creaking away in wagons to the little towns around. [1972:77-78]

Originally intended to assist Sunday school teachers plan and teach their weekly courses, the initial “Chautauqua Lake Sunday School Assembly” quickly grew into a vastly larger project teaching science, art, history, religion, languages, agriculture, and much more. Farmers and workers who couldn't go to college were given access to college level information at Chautauqua that was a means of incorporating education into their working lives (Vincent 1886:10). The period of U.S. history previous to, and especially following the 1874 opening of Chautauqua, witnessed the need for education for the rising middle class as they branched out from the farms and from industrial and manufacturing jobs provided by the robber barons of the Industrial Revolution and the cultural shifts at the beginning of the Gilded Age. If a family was going to get ahead and prosper, education was the cornerstone of advancement. Chautauqua eventually expanded its reach to millions by establishing one of the first degree-granting correspondence schools in the country called the Chautauqua Literary and Scientific Society (CLSC). Chautauquans used education to grow financially, spiritually, and pragmatically in a process that made the quality of their lives and their positions in a rising American Victorian society spiral upward. The Institution became an example of an immense social movement’s efforts to make upward mobility a norm. By the turn of the century there were over numerous Chautauqua

assemblies, circuits and associations nationwide (Irwin 1987:42-45, 75-80; Morrison 1974:53-70).

Alfreda Irwin characterizes the first 25 years of Chautauqua as those of phenomenal growth.

We can note . . . that during the first twenty-five years, Chautauqua grew from a school for Sunday school teachers, to a school for public school teachers. By 1881 Chautauqua was conducting correspondence school teaching in its theological school; and by 1885, in its blossoming state-chartered university. It had also developed a public platform for general discussion of cultural, social, and governmental questions which constituted another form of popular adult education. A music school took shape and grew. Art education was formalized and flourished. A physical education school offered not only teacher training, but instruction in specific physical exercise skills and sports. All along, religious education for all ages was continuing through courses and popular lectures. But probably most significantly, Chautauqua introduced approximately 200,000 readers to programmed home reading during this first period. It was called the Chautauqua Literary and Scientific Circle. It offered four years of reading equivalent to that one might do during a four-year college course. . . . there were 10,000 circles formed for group study during the first 20 years of the CLSC. [Arthur] Bestor indicates that the permeation of American communities by the reading circles "is perhaps the most significant social fact about Chautauqua." [Irwin 1996]

Philanthropic Histories

In the years since Chautauqua's opening the Institution grew through land acquisition, facility building, infrastructure expansion, and the creation of parks and beaches. Initially Chautauqua went through a period of growth adding buildings, hotels, land, streets, and families to the grounds. Swelling from the 50 acres donated to the Chautauqua Sunday School Assembly by the Chautauqua Lake Camp Meeting Assembly Association located in Erie, Pennsylvania, it has grown to over 770 acres including a farm and golf course (Irwin 1987:12-14; 1991).

Those fiscally responsible for Chautauqua's growth shifted throughout its history. In 1874, at the first camp meeting, Lewis Miller instituted the idea of the gate fee. While some disputed the idea, it was intended as a one-time fee for the events to relieve management of

tracking down parties for payment. The gate fee in 1996 is outlined in this footnote⁴². When the 1874 meeting did not make it into the black, Miller came up with the rest of the funds personally. Being a savvy businessman he quickly took the steps to insure that other men of wealth were brought into the picture to take up the financial burden and to become Chautauqua's first board of trustees. By the third year the details had been worked out so that the books balanced the sanitation, food, water, and sleeping quarters costs against the earnings from the gate. As the Institution grew in popularity its capital projects grew as well (Irwin, 1996; Morrison 1974:37-38).

By 1889 acreage had been added to the grounds, a major hotel had been built and cafeterias, theaters, streets, an electric plant, parks, reservoir, sewer lines, and the like were the causes for amassing considerable debt. Then as today, philanthropists were available to donate a building or a park with their name engraved on the side for recognition, but infrastructure had to come out of the Institution's budget. Property brought with it equity and an ability to buy, invest, and incur debt as the future looked quite bright. For most intents and purposes the next 40 years were successful. But as the Institution ran up debt, it sold bonds on itself, had various kinds of difficulty paying them off, and was buffeted by the financial conditions resulting from poor management decisions. Debt continuously plagued the Institution (Chautauqua Annual Reports 1889-1903).

On January 8, 1889, W. A. Duncan, the secretary and superintendent, prophesied events of a century later in the 1980's while spelling out the dangers to an Institution that continuously spent beyond its means:

I would suggest that the time has arrived when it is necessary that you should take action looking forward toward the endowment of Chautauqua assembly and university. Many of you have labored, prayed and made great sacrifices for its success in the past; . . . Is not today the proper time to look forward to and plan for its endowment? Gentlemen, endow this institution that you love, so that neither physical nor material disasters can impair its usefulness; so that these taxes and licenses which have caused so much anxiety in the past, may be made less burdensome. Endow it so that dormitories may be erected and scholarships founded for students who desire to come to Chautauqua for the two summer

months. [Chautauqua Assembly Annual Report of the Secretary and Superintendent 1889]

While an endowment fund was set up, between 1889 and 1922 the fund fluctuated from various high marks of nearly \$50,000 to much less. It began with \$2,069 in 1889 and ended with \$2,250 in 1922 during which time the fund was alternately shored up and then raided. Chautauqua was going through its first monumental growth spurt. Hundreds of homes, dozens of facilities, expanding seasons, growing crowds, national conferences, the WTCU formation, Chautauqua University was chartered; schools of languages, chemistry, Shakespeare, elocution and calisthenics; the Chautauqua Literary and Scientific Circle exploded and these and hundreds of other happenings had to be funded (Morrison 197445-50). The future was ever presently bright, so borrowing money from the endowment was small fry in the scope of the enormity of what the administrators thought was to come. In 1900 George E. Vincent, son of co-founder John Vincent and then President of the Institution, called for serious financial strategy to keep Chautauqua from becoming just a summer resort. In 1910, \$200,000 worth of bonds were sold to pay for infrastructure and in 1915 another \$100,000 of bonds were sold. While no bonds were defaulted on, maintaining payments on the bonds added to the financial problems that began stressing the organization.

The financial and philanthropic tide would rise and fall for Chautauqua. The Chautauqua University chartered in 1883 on the grounds and run by the renowned William Rainey Harper of the University of Chicago, closed its doors in 1893. The Chautauqua Literary and Scientific Circle ran profits year after year until the 1920's when the alternative pastimes of the automobile and radio took their toll. Buildings were built and razed but by the end of World War I, even after another \$300,000 worth of bonds were sold, Chautauqua had come to a juncture where it had to resolve a fiscal history of over spending.

The First Campaign

In 1919 Chautauqua inaugurated its first major funding campaign based on its first "Comprehensive Plan". Philanthropy to this point had been based on the tradition of "Old First Night", begun by Miller and Vincent. As noted in the previous chapter this was, and still is, the only night when the sole function of an *event* is to raise funds for the Institution (Morrison 1974:38). The rest of the philanthropic sources were from the selling of bonds, donations of property, buildings and money from those "friends of the Institution" with the means and from the Board of Trustees. The "Half Million Dollar Campaign" (\$6,547,543 in 2011), was based on a five point Comprehensive Plan developed by the Foundation's Board adopted at its February 1919 Director's meeting (Chautauqua Weekly 1919:1):

To clear Chautauqua Institution of all debt.

1. Because the indebtedness [\$550,000] of the Institution is too large for complete security and ought to consist of only such sums as may be borrowed to carry on the work from season to season or for particular projects which may pay for themselves out of their own revenues.
2. Because the mortgage on the property of the Institution ought to be eliminated as a measure of safety and assurance of permanency.
3. Because the annual interest charge of over \$25,000 is too heavy a drain on the current revenues of the Institution and such money ought to be available for repairs, improvements and the expanding needs of Chautauqua.
4. Because the elimination of indebtedness and interest charges would have a practical effect of endowment and would pave the way for additional endowments largely impossible under the present conditions.
5. Because the war has demonstrated how invaluable Chautauqua is to the nation and how vital it is in the life of individuals. [Chautauqua Quarterly 1919:5]

The campaign publication makes ideas clear that are still salient. As an educational institution with no endowment to speak of, and with no municipal or state tax dollars for operations, it had to raise all of its operating funds from within. The Institution has no power of taxation and therefore has to pay for what are generally "public services" through service charges to Chautauquans to cover costs. These charges are genteelly referred to as the "village tax". At

this juncture the Institution provided sewer, water and power via its own electric plant all paid for by service charges.

In 1919 the Institution maintained \$1,200,000 of the Institution's property with a debt of \$550,000. A number of factors were at work: the debt had been rising since 1892; Chautauqua had to make serious accessibility adjustments switching its main entrance from the lake to the road and trolley line; and the Institution had built a golf course.⁴³ Just before World War I the Institution built eight major structures: the first and second Colonnades, Post Office, Hall of Philosophy, Athletic Club, College Group, Pergola, Hospital, Miller Bell Tower and the Hall of Christ; and they bought an adjoining farm. They were strapped for cash, could only earn during the short summer season, were paying \$25,000 annually in interest (\$327,377 in 2011) and the campaign was the only responsible only way out (Chautauqua Publication 1919).

The Board raised \$327,339 in the first year of its campaign. Through a prior agreement with John D. Rockefeller, a 20 percent match was provided bringing their total to \$392,807. The total for the campaign topped out the next year at \$418,080.19 (or \$5,472,667 in value in 2010). In 1920, the board of trustees voted to raise the last \$100,000 through selling subscriptions of \$100 each. The Institution retired \$109,500 of debt leaving more funds for operating than in previous years (Chautauqua Publication 1922).⁴⁴

The 1920's reflected the boom at work across the rest of America. The Arts and Crafts Quadrangle was expanded for classes, the Smith-Wilkes lecture hall was built as was the Hall of Missions, the Women's Club, Norton Hall, Smith Library, and Hurlbut Memorial Church, a new pier, new entrance and a new filtration plant. Alfreda Irwin:

These are called the Golden Years [1915-1930] because Chautauqua Institution initiated symphony orchestra programming, organized its own symphony orchestra, organized its own opera company, introduced the Cleveland Play House as a resident company, established a relationship with New York University so that it could offer many courses for direct university credit, enlarged its golf course to 18 holes, enlarged its physical plant with new buildings, including a new water filtration plant, and continued to develop its platform. [Irwin 1987:50]

It is also true that this historical juncture marked a shift from purely educational and religious goals of serving the middle class toward leisure, artistic and community goals that satisfied the desires of the rising Chautauqua bourgeoisie. Golf courses, symphony orchestras and opera companies tend to take up little space in public classrooms, on farms or factory floors, but were becoming prominent at Chautauqua. While a large number of Chautauquans were teachers and preachers, these additions to the program reflect aspirations to emulate the upper crust of society as well as to draw this crust to the Institution. Thinking philanthropically, one way to attract wealth is to provide those who hold significant capital with the luxuries, services and cultural products they are accustomed to. The pragmatic service to the middle class on which the Institution was founded was losing its grip.

Theodore Morrison sums up the 1920's and the beginning of the Depression consummately in the following:

Such additions and improvements, needed if Chautauqua were to keep pace with the momentum of the country, nonetheless implied a belief in continuing prosperity that received a shock with the stock market crash of 1929 and the ensuing years of depression. Chautauqua, as H. J. Thorton points out, was not a profit-making organization, not a stock company. Its charter commissioned it to promote intellectual, social, physical, moral, and religious welfare. But like all educational institutions, it had to pay its bills and keep solvent, and could never be unmindful of the number of visitors it could attract season by season. Its sources of income have been mainly the sale of gate tickets, tuition charges in its various schools, membership fees in the CLSC and the sale of prescribed or recommended books, a percentage of the charges paid by guests to cottage or hotel owners and charges to residents for light, power and water. A very important source of funds has also been Old First Night giving. Surpluses, in years when they occurred, had been modest and never enough to pay for capital improvements. For increased water supply, sewage disposal, electricity, and roads, Chautauqua relied on special bond issues; for buildings, it depended on personal bequests, often commemorative, and again on Old First Night gifts, which have been a source of scholarships as well. [Morrison 1974:102]

The twenties saw moderate growth in the gate, but the advent of radio and the rise of the use of automobiles led to other pastimes for Americans. The tent Chautauquas, all independent of the Institution, died out as did most of the momentum of the CLSC. The CLSC that peaked

with over a million members when it needed its own post office now dwindled in the face of new technologies and popular communications. Automobiles gave the American population for the first time the mobility to pick and chose different forms of entertainment and tourism. Radio and movie houses were the new distractions. And in the face of these popular changes Chautauqua's traditional middle-class audience was slowly shifting toward the upper classes whose interests were reflected in the growing programming.

Crash and Redemption

1929 was a boom year at the Institution, a year reaching nearly a half a million dollars in donations, the highest figure since World War I. But it was more expensive to run the Institution in 1929 and due to some unusual expenses and interest due on bonds, the \$10,000 thought to be a surplus quickly turned into a loss. The next two years, the beginning of the Great Depression, were losses and while the 1930 season was viewed as a good one rhetorically by President Bestor, in reality it saw a drop in revenue of more than \$300,000. Visitors feared there would be no 1933 season and the newspapers were announcing that Chautauqua Institution was on the verge of bankruptcy. Bestor at the end of the season could not make the traditional update on the next year's summer as he could not guarantee there would be one. By 1934, gate receipts dropped from \$105,000 to \$61,000 (Morrison 1974:102-103).

The Depression took its brutal toll on Chautauqua. The administration took steps to adjust for the loss of income: reduced gate fee, reduced rates across the board at clubs, hotels and in the schools, staff and pay reductions, even shortening the season by ten days; but it was not enough. By the fall of 1933 the real extent of the crisis was clear; the Institution could not meet its interest payments on the \$785,000 debt. Just before Christmas that year the Institution was forced into receivership under the direction of a Federal Court. The Trustees reported the Institution's financial condition to the Federal Court and asked for a friendly receivership so that

its assets could be conserved for the benefits of its creditors, many of whom were local businesses (Bargar 1994; Chautauqua Publication 1935:3; Morrison 1974:105).

In 1934 a committee of trustees composed of David L. Starr, Dr. William A. Anderson, Dr. A. F. B. Morris, L. C. Edgar, and Samuel M. Hazlett was approved by the district court to work with Institution President Arthur Bestor and the receivers⁴⁵ A. E. Skinner and Dr. Charles R. Haskin, to open Chautauqua for the next season providing it would not run up any debt. The committee had to guarantee the receivers against loss and underwrite the season for it to occur. They agreed (Starr 1949:2, 5).

The committee in turn formed the Chautauqua Reorganization Corporation (CRC) headed by Samuel M. Hazlett a Pittsburgh attorney. It scrutinized the income and expenses of the 1934 season and found no improprieties or over expenditures. The committee hired a New York fundraising firm, Marts and Lundy, to study their predicament and conduct a campaign. They were given three years to raise enough funds to cancel the debt. Solicitation by Marts and Lundy began in 1934. It was an uphill battle as bond holders were opting for bankruptcy, but did not want to lose their holding at 20 percent on the dollar (Starr 1949:6). Chautauquans kept up a continuous battle raising dollars and fighting off creditors. At one juncture in the CRC, committee member David Starr called a vote of the CRC Board of Directors on whether to continue or surrender Chautauqua to its creditors. The vote was tied and Starr had the tie breaking vote. He asked for a night to consider it and returned voting to continue on. He explained that in that evening of deliberation, he heard on the radio Handel's "Largo". For years the Sunday evening program was closed with the organist Harry Vincent playing Largo. Starr remembered in particular a season close with Largo where the audience sat in rapture and reasoned: "I recalled that it was up to me to say whether or not the dreams of those people were to be shattered, and for many who had invested their all in Chautauqua, lost" (Starr 1949:8-9). The next day he voted to continue "to fight it out" (Starr 1949:9).

The debt and cost of the upkeep of the grounds and Institution buildings were the two major causes of Chautauqua's dilemma. All improvements were made out of the general funds.

Its filtration system, sewer system, improved streets, storm sewers, and fire system had never been assessed against property leased by home owners. Property at the Institution was leased to home owners and was all ultimately owned by the Institution. There was never enough income to pay for the improvements, so the Institution consistently bonded (Irwin 1987:57-58; Starr 1949:6).

The Chautauqua Reorganization Corporation requested from property owners a contribution of twenty percent of the public tax assessed value of their property in payments to be collected over a period of three years. The majority of these owners did so as a clear indication of their dedication to the ideas upholding the Institution, raising in the first year, 1934, \$146,499.50. At the 1934 Old First Night, \$33,164 was raised and \$28,000 was raised by the citizens of Jamestown and Chautauqua County bringing the summer's total to \$210,000 (Chautauqua Publication 1935:6). This was not enough to appease the major bond holders. The receivers were discovering additional liabilities, bad assets, bad accounts receivable and more accrued interest (Irwin 1987:59). An incentive was added that for every lease holder who paid their twenty percent, they would in turn receive a deed to that property turning over the ownership from the Institution. This added more dollars and relieved the Institution of the future burden of assuming responsibility for the upkeep and care for those properties. But the campaign was still not earning enough to close the gap on the \$814,956 debt (Irwin 1987:59; Morrison 1974:106; Starr 1949:7-9).

Chautauquans were worried sick that their efforts were going to fail and that the Institution they loved and had grown up serving was going to turn from Chautauqua to woods. The campaign was fought on more than one front. Creditors had to be persuaded to wait while certain information had to be kept out of the public eye. At one contentious meeting CRC members were asked some “dangerous questions” by a woman in the audience about contracts with solicitors and how they were being paid. “Had she known that they [CRC members] were being paid a salary instead of a commission it would have created a division of commission against salary, thus throwing the real question, “How to raise money,” to one side (Starr

1949:10-11). Confidence and credibility in the CRC was essential and after Starr ascertained that she was not a donor or “subscriber” he said, “You are not a subscriber, not a member of the Corporation and therefore in no position to demand information or criticize those who are.” An example of how carefully the campaign had to be managed and how unnerved many Chautauquas were about committing funds in such a troubled financial situation and time.

It was then suggested that the entire Institution be put up for sale. Every seat, every tree, every bench in the amphitheater, plots of ground, bridges, etc., were symbolically sold. It was a huge success. Plaques still hang from a variety of spots across the grounds from this drive. To remedy the problems of the poorly maintained infrastructure, the Chautauqua Utility District was formed and was given the authority through New York State to levy taxes for certain purposes. When repairs or construction projects were undertaken, it became mandatory for every property owner to pay their part of the expense relieving the Institution of its liability. The Board of Trustees was responsible for a great deal of the funds raised (Irwin 1987:58; Morrison 1974:105-106; Starr 1949:9-14). “There were many dark and discouraging days in our drive”. Wrote Starr, “The sun did not always shine (1949:9). After one particular night of fundraising with nothing to show for it, he was ready to quit. A woman sat down next to him and said that she and her friends had been meeting every morning in the Episcopal Chapel to pray for the campaign. One of the solicitors said a ten year old boy had come up to her table and gave her sixteen cents he’d saved for Chautauqua. He found new resolve in this story and the “widow’s mite” and never looked back.

Why was it? – because “the prayer of the righteous availeth much.” Bishop Vincent in his book Chautauqua Movement page 92 described it as “our struggle.” The harder the struggle the mightier the crown. Go on. Have faith and holy purpose. Go on to know and will to do and be; and when actual circumstances are discouraging, trample circumstances underfoot. Be Master of Circumstance, like the king that God called you to be. [Starr 1949:9]

Starr articulates the convictions Chautauquans were holding during this period. Religious compassion, following the examples of the young, preserving Chautauqua, and how the arts can affect people and stir them to action. Financial fear had to be motivating Chautauquans as well. Once valuable dollars were committed to the campaign, there was no guarantee that the sacrifice would pay off. They might not have reached their goal and the receivers would simply have taken their dollars and they would have still lost Chautauqua. The ideology articulated was under stress not only from the Depression in general, but from the gamble Chautauquans were taking trying to save their Institution.

\$575,000 had to be raised within two years to pay the debt. By the summer of 1935, \$304,000 was pledged but it was not enough for the bondholders who called a meeting in Buffalo that June. The Reorganization Corporation secured a delay, but the message to Chautauquans was clear: either find the funds to save the Institution or be prepared to sell it for a pittance. The bondholders agreed to withhold foreclosure and to waive accrued interest if \$125,000 in subscriptions was secured and \$75,000 was paid by April of the following year. Chautauquans met the challenge (Morrison 1974:106-107).

By the summer of 1936, the Institution faced having to raise \$150,000 by the end of August. The symbolic sale of the grounds increased in intensity. The trees on the grounds were now symbolically sold for \$10 as were amphitheater seats, the Institution of course retained ownership. The Golf Course house went for \$2,000, greens for \$250, and selected patches of ground sold for 10 cents a square foot. Old First Night on August 5th led to gifts of over \$55,000. Still significantly short of their goal, Mr. and Mrs. Ralph Norton offered a matching fund, one dollar for every two raised up to \$35,000 if the entire debt were raised. By the 20th of August there was still \$37,000 to be raised. Then a Mrs. Percy V. Pennybacker channeled through the Women's Club a gift of \$100,000, backed by John D. Rockefeller who agreed to close any remaining debt on the last day of the campaign and the campaign was won (Morrison 1974:107-108). Two blasts of the fire siren announced the Institution was completely out of debt (Irwin 1987:4).

The charter of the Institution was amended by the state prohibiting mortgaging or pledging property for capital outlay without approval of two-thirds of the Trustees. It was specified that a majority of the trustees must be property owners and the property owners must elect four of the twenty-four trustee seats. The business operations were separated from the educational program, business was assigned to six trustees and the program to the Institution president who was also given a position on the executive board. These provisions were established to keep the Institution legally responsible for staying out of debt (Morrison 1974:108-109, Starr 1949:17-18).

Redemption to Foundation

The Chautauqua Reorganization Corporation was dissolved and replaced by the Chautauqua Foundation on May 14, 1937, pursuant to the membership Corporation Law of the State of New York. It was clearly recognized that now that the Institution was out of debt, it needed to stay that way. "Entirely independent of Chautauqua Institution, the Foundation is chartered to receive gifts and legacies, to invest the funds it accumulates for the purpose of undergirding the Chautauqua program and its facilities" (Irwin 1987:60)⁴⁶ Echoing the 1889 message of W. A. Duncan, Samuel M. Hazlett reiterates the importance of an endowment for the Institution: ". . . after the retirement of its obligations and the reorganization of its business affairs, there is a sufficient endowment in the hands of the Chautauqua Foundation, separate and apart from the Institution, the income of which will insure the proper operation of Institution affairs irrespective of income received during non-prosperous years" (Irwin 1987:60).

The purpose of the Foundation according to its charter "is to assist Chautauqua Institution in carrying out its educational, religious, and other programs. The Foundation is empowered to solicit and receive and to acquire by gift, purchase, devise, bequest, or in any other ways, real and personal property, to hold such property and to invest and reinvest the same, at least annually to the Institution" (in Irwin 1987b). Its original endowment came from Chautauquans during the summer of 1937 plus the Old First Night gifts totaling \$42,707 and rising to \$50,142 by the end

of the season. The first \$50,000 unrestricted gift⁴⁷ was designated as the Samuel M. Hazlett Gift in honor of the man responsible for organizing the "Save Chautauqua" Campaign (Irwin 1987:60).

The original Foundation charter specified that there could be no less than seven directors and no more than fifteen. In addition to the Board of Directors, there was the Board of Regents of not more than 100. The first membership on August 10, 1937 listed 70 members. The by-laws stipulate that: "The duties, powers and authorities of the members of the Board of Regents shall be as follows: to elect two members of the Board of Directors; to consult, advise and confer with the Board of Directors in reference to the affairs of the corporation; [and] to assist the Board of Directors in disseminating information regarding the Foundation." This Board of Regents continued until 1966 when it was merged with the Foundation membership composed of those who contribute to the Chautauqua Foundation. The membership elects the Board of Directors (Irwin 1987:60).

WW II, the Cold War, McCarthy and Mediocrity

Chautauqua for all intents and purposes remained the same from the late 1930's through the mid 1960's. Chautauqua was a comfortable community by the lake inhabited by a core group of families and visited annually by a predictable group of visitors. It was solvent but the Institution experienced little growth or change. No new buildings were erected, the roads slowly deteriorated as did the rest of the infrastructure. The annual campaigns, fees, and the gate rarely paid the bills and the annual deficit was generally paid off by a couple of the more prominent philanthropic families who were represented on the Board of Directors.

Chautauqua Historian Alfreda Irwin described this era as one of caution and conservatism. "Those whose lives were touched by the Depression, will always have a tough time forgetting it" (Irwin 1991). World War II, Korea, and the McCarthy era created an atmosphere of conservative spending. After going into receivership the Institution coasted, twice just shy of getting into crippling debt. This trend continued until Chautauqua was threatened

with decay. The annual fund was not keeping pace with increasing costs. The Chautauqua Foundation originally chartered to raise a million dollar endowment, solicit gifts, run “Old First Night” and provide annual income to the Institution was basically a paper tiger raising no significant funds and was not under the direction of any paid or regular staff (Morrison 1974:108). There were no philanthropic campaigns other than the annual fund. The annual deficit bailouts by a customary few were becoming habit forming for the Board. Centripetal stasis rather than centrifugal dynamism was the organization’s operating paradigm.

The program rolled on, the symphony played and the front porch neighborhoods were maintained. Property was sold and modern homes were built, but the Institution was a shadow of what it was at its founding and of its first fifty years. It had become a quiet, gated-community by the lake, self serving, redundant and run down. Its buildings, its Victorian homes, its streets were increasingly in a sad state of disrepair, its population aged (Simpson 1999:98-99). Jeffrey Simpson writes:

Still this was the 1950’s, when complacency and conservatism were the order of the day, and Chautauqua, in its life on the Grounds, was in an especially conservative mode Traditions became entrenched and valued for their own sake, and families boasted on the number of generations they represented at Chautauqua. One joke, told affectionately again and again, was that “Chautauqua is the place where old ladies bring their mothers.” “Nothing ever changes” people said at the beginning of another Season, nodding sagely at each other, and then continued, “*And that’s the way we like it.*” [1999:94]

By the 1960s the Institution was entrenched in a very conservative operating mode. The Board of Directors discouraged advertising the program in national newspapers because “they feared the crowds advertising might attract. The very fiscal and social conservatism of its leaders, which they had hoped would save Chautauqua for themselves and their families, ironically led them to financial peril” (Simpson 1999:102). This constituency was composed of older Chautauqua families, many of whom were property owners and the regular audience of summer attendees. The Institution slid back into what again became a continuous state of debt.

Television and other arts festivals were taking away their audience. “Chautauqua had turned into a shuttered storehouse, decaying around the ephemeral riches it tried to hoard” (Simpson 1999:102).

Chautauqua in the 1960s was run down and was at the juncture of either letting the decay continue, closing the program down and continuing as a lakeside village; or, taking steps to revitalize. Paraphrasing Margaret Mead, it only takes a few key people to change the world; this was what happened to Chautauqua. As the Institution’s future was becoming more and more dismal the young great-grandson of co-founder Lewis Miller, Richard Miller took an interest in Chautauqua.⁴⁸ Miller, a well educated, highly intelligent practitioner of law and finance, began as the youngest member ever to be appointed to the Chautauqua Board of Directors. In 1970, he was elected Chairman of the Board that thereafter instituted a number of significant changes. He accomplished the following:

- Raised the target of the annual fund to pay for the actual costs of the program to avoid an annual budget deficit.
- Rebuilt the Chautauqua Foundation from an ineffectual institution into one that by the 1990s had \$38 million dollars in assets producing over \$1.2 million a year for the Institution.
- Appointed a new president, Oscar Remick, with a solid background in education administration with the stamina to rebuild the Institution.

Remick, Miller and new Board members began to reprioritize the relationship between the Institution and Chautauquans. If change were to come, it had to be with the full support of the Chautauqua community. The amphitheater underwent major repairs after being hit by a tornado demonstrating that the new ideas coming out of the administration were sound and practical. The Institution applied for and received a \$1 million grant from the local Gebbie Foundation that stipulated they had to raise \$3 million on their own to erase their debt, build a capital fund and operate without a deficit. Chautauquans came up with the funds to make the grant a success and a new consciousness of success through dynamic leadership and fiscal responsibility was

achieved. It was the beginning of a new way of thinking about donating to the Institution. The old days of dollars down the tubes were over. Miller and Remick represented a fresh start and a positive way to think about the future. Philanthropic optimism was born and philanthropic *credibility* was established, a must for continued success in fund raising.

One of the benchmark changes in early 1970s was the construction of the first condominium. Places for young families to stay were built and many of the older rooming houses were bought and remodeled as apartments. The idea of a bare light bulb hanging in the hall that led to community bathroom wasn't selling accommodation space anymore. New homes began to be built and a substantial number of refurbishments to the older homes began. The white Victorian homes were being rebuilt from the inside out: new windows, walls, foundations, insulation, wiring, kitchens and on the outside they were returned to their original multicolored splendor. Spurred on by the bold success of their leadership, Chautauquans were investing in their property and the Institution. Real estate developers were investing in properties on the grounds and turning them around for sale. People from outside the traditional families and returnees were being attracted to the grounds and many were buying property or renting condominiums.

In December of 1976 Remick resigned his post to take a job at the nearby State University of New York College at Fredonia as dean of performing arts. Miller was disappointed having held higher hopes for Chautauqua presidents to move up the administrative ladder rather than down. The next president, Dr. Robert Hesse coming from Medaille, a small inner city college in Buffalo was appointed by the Board in 1977. During this period, Richard Miller recognizing that the Institution was now on sound financial footing, resigned as chairman of the board of trustees but retained his powerful position a chair of the Chautauqua Foundation. Under Hesse's direction a number of significant changes took place that consolidated the authority under the administration. At this time a number of subgroups were functioning autonomously: "the orchestra, the Cleveland Playhouse, the opera, and to a lesser degree the CLSC and the Women's Club" were running independent of the administration (Simpson 1999:110). Hesse reformed the

music program appointing a new music director and reorganized the contractual agreements with the orchestra bringing it under the administration's control. After decades of relying on outside theater companies like the Cleveland Playhouse to put on plays, Hesse hired theater director and educator Michael Kahn to create the Conservatory Theater Company and the Theater School for the Institution bringing the theater in-house (Simpson 1999:109-113).

It is necessary to note that the ultimately successful efforts to centralize control made the Hesse years at Chautauqua frequently contentious. There were strong partisan feelings on the Grounds, particularly regarding the difficult negotiations with the orchestra, which had – and cultivated – its own adherents. At times it seemed as though there were hard feelings relating to everything from program issues to an attempt to change the way garbage was being collected. In fact, it was the painful knitting of bones of an organization coming back together again after decades. [Simpson:1999:112]

In 1979 the Institution conducted its first major campaign since 1919 called the “Second Century Campaign” commemorating the first 100 years of the Institution. The fact that the campaign raised over \$8 million dollars indicates the shift from philanthropic skepticism to trust and an establishing consensus regarding the credibility the Institution's governing body. “Chautauqua had regained national visibility for the first time in thirty-five years; and generally Chautauquans had turned from a fond but unproductive reliance on the past to realizing that they had a future” (Simpson 1999:109). A full time development director was hired and fund raising began on a level parallel with any university or hospital. The 1978 class of the Chautauqua Literary and Scientific Circle named their class after Margaret Mead who spoke at the Institution that summer (Simpson 1999:109). By the 1980s the Institution was investing in its infrastructure again. The roads were repaved, new services were offered and the program expanded. The first major highly successful \$5 million endowment campaign from 1987-1989, the “Overture for the Future”, was designed to raise endowment for the performing arts program and was \$538,100 over goal. The Foundation flourished, trustees were being attracted from all manner of finance and top executive positions nationwide.

By 1990, two years before the time period of this study began; the Institution had attained financial stability, had hired expert administrators, had cemented its philanthropic credibility, was on the solid road to rebuilding its infrastructure, and was planning a stable and prosperous future. Chautauqua was in the midst of the most significant growth period in its history. The next chapter will discuss this philanthropic process as it unfolded in the early to mid-nineties at Chautauqua and will detail the “Chautauqua Challenge Campaign” that took place during the time of my study.

Chapter 4

The Chautauqua Challenge Campaign

“Gathered, Each to Give and to Receive”⁴⁹

“To whom much has been given, much is required”⁵⁰

The present chapter develops my distillation of working definitions of philanthropy to lay the ground work on Chautauqua for the subsequent summarizing account. I take the first steps here to present the cultural environment at Chautauqua that encourages giving and to detail the mechanisms that bring institutional representatives and prospective donors together in philanthropy at Chautauqua.

Part of my introduction to philanthropy came from readings cited in the references and at meetings at the Indiana Center on Philanthropy at the University of Indiana. The Center on Philanthropy and the Indiana Center for Non-Profit Studies assisted with funding my fieldwork and introduced me to the philosophical underpinnings of philanthropy, its history and scholars and scholarship in the field. A number of the ideas evidenced in the readings I sought out and in discussions with members of the Indiana Center on Philanthropy and the Indiana Center for Non-Profit Studies are summarized below, but the majority of my ethnographic education came from the field. I learned about the clear distinction between philanthropy and fund raising campaigns. The campaign is the well-informed and organized effort to solicit funds from individuals, organizations, and businesses. Philanthropy is the actual multi-dimensional act of *giving* to assist other people or organizations for a general good. The following will provide some working definitions of philanthropy as background to this study and will propose a definition of philanthropy that aptly characterizes the process at Chautauqua. I will discuss specifically why

Chautauqua needed to raise money during this particular time period and the nuts and bolts of the campaign I was in the field to study: the Chautauqua Challenge Campaign.

Definitions of Philanthropy

Philanthropy has a host of meanings and definitions and a deep history from Babylon, through the ancient Greeks and Romans and throughout Western civilization. Leviticus 19:18 “love your neighbor as yourself” or the Golden Rule of "Do unto others as you would have them do unto you" is a foundational statement of philanthropy over time. That others may share in what one values and that what one values holds some common good are key ideas. Self and other are required in a discursive exchange of ideas and then of substance: goods, services, money. Bakhtin would say self and other are at the boundary between each other's inner monologues (inner thoughts) and the others' ideas (1986:61-62). The interaction is where understandings are generated through inter-animating relationships between speaker and listener, between the giver and receiver (Bakhtin 1981:282, 1986:72, 75, 77). Philanthropic behavior resonates with the intent of positive change; a centrifugal push toward rearranging a set of conditions that centripetally coalesces into a new, improved set of conditions. Two parties engage in an interaction where one is giving and one is receiving through a process mediated by needs of the first and the ability to satisfy those needs by the second. It is an act of *conscience* where one party seeks the betterment of the second, including situations when the gift goes full circle and the donor benefits from their own gift.

Robert L. Payton, Professor Emeritus of Philanthropic Studies at Indiana University, Senior Research Fellow of the Center on Philanthropy and the Center's first director expands the scope of the definition: "Philanthropy includes voluntary giving, voluntary service, and voluntary association, primarily for the benefit of others; it is also the 'prudent sister' of charity,

since they have been intertwined throughout most of the past 3,500 years of western civilization” (1984). Payton qualifies philanthropic acts as voluntary, not coerced, but given in a context of choice. The concept is further expanded by Warren Ilchman, past Executive Director of the Center on Philanthropy, who sees philanthropy as an "umbrella word" under which many different subjects are gathered: "values, organizations, and practices that entail voluntary action to achieve some vision of the public good" or the "private" production of "public goods;" of relieving human suffering out of compassion; improving human potential on the principle of progress; reforming social problems through principles of justice and empowering the community through the principle of participation (1996:1, 3; adapted from Wisely 1995). Payton and Ilchman see philanthropy as a companionate vehicle for relieving suffering and doing good.

Jon Van Til⁵¹ devotes fifteen pages defining philanthropy's compassionate reach into community (1990:19-34). He culminates his definition in the following: “Most succinctly, then, contemporary philanthropy may be seen as the *voluntary giving and receiving of time and money, aimed (however imperfectly) toward the needs of charity and the interests of all in a better quality of life*” (1990:34). Van Til quotes Brian O'Connell who believes philanthropy "helps us to discover new frontiers of knowledge; to support and encourage excellence; to enable people to exercise their potential; to relieve human misery; to preserve and enhance democratic government and institutions; to make communities better places to live; to nourish the spirit; to create tolerance, understanding, and peace among people; and to remember the dead" (1990:25-26). Van Til also points out through Michael Katz's *In the Shadow of the Poorhouse* (1986) that philanthropy can be “misguided, ineffective and deceptive in its application” (1986:89).

Bakhtin and Mauss understood that interactions are never one sided, always expedient or virtuous. Reciprocity opens philanthropy to a wider, more encompassing expression of

exchange. Donors have expectations: to see how their gifts impact receivers, to take a certain satisfaction from doing good. And then there are those who give with the express expectation of receiving direct benefits from their gifts as in gifts to a symphony or nature park.

Francie Ostrower studies gifts not strictly intended for the alleviation of suffering, but private giving for public purposes like universities, museums, hospitals, churches, temples, mosques, environmental causes, social services institutions, parks, and research institutions. Her work demonstrates that American elites “fashion a separate cultural world for themselves by drawing and reformulating elements and values from the broader society. . . . [they] adapt it to an entire way of life that serves as a vehicle for the cultural and social life of their class, overlaying it with additional values and norms. . . . philanthropy becomes a mark of class status that contributes to defining and maintaining the cultural and organizational boundaries of elite life . . . philanthropy grows out of the donor’s sense of identity” (1995:6). This connection between giving and identity is pivotal for this study as donor identity in conjunction with Chautauqua’s molds the organization itself (1995:11).

Peter Frumkin in his work on differing strategies for giving defines some of the social aspects of philanthropy: “Philanthropy allows individuals to express their values, to single out particular issues or causes as being worthy of attention and through gifts of money, to support activities that benefit the public” (2006:1). Philanthropers operate outside of governments choosing causes to support and problems to solve. They can locate and support important social innovations in the form of research or programmatic breakthroughs. Some give to promote economic equity by giving to nonprofits that serve the poor, philanthropers large and small can help improve the lives of those less fortunate. Another rationale is the affirmation of pluralism, that philanthropers can give and sustain the existence of multiple points of view in the public

sphere: from scholarships, to Greenpeace to the National Rifle Association. Last, Frumkin states that philanthropy supports the self-actualization of donors by using their wealth or time to translate their values into action (2006:12-19).

The definitions of philanthropy cast a wide net, but the most significant discussion addressing philanthropic behavior at Chautauqua is in an article by Susan Ostrander and Paul Schervish titled "Giving and Getting: Philanthropy as a Social Relation" (1990). Ostrander and Schervish concentrate on philanthropy as a distinctive *social relation* occurring between donor-side and recipient-side actors containing "identifiable patterns of interaction" (1990:69-70). They follow Mauss in acknowledging the complexity of the social relations of any gift (Mauss 1990:79). The patterns involve give and take, not always equally balanced, making for a power difference between donor and recipient. Alvin Gouldner assumes a culturally embedded norm of reciprocity where an individual is obliged to give, to receive, and to reciprocate (1960:171). Donors have more choice than recipients about the nature of the transaction, but recipients also have choices in what happens to them by shaping donor actions and the nature of the philanthropy in their domain. Each group is constrained by the structure of philanthropy while they in turn shape that structure as they play out their roles (Mauss 1990:70-71).

For my purposes in this work about Chautauqua, philanthropy is a social relational discourse embedded in a particular cultural and economic context. This discursive environment is composed of references to physical and economic needs and complex interrelationships reflecting values and ideologies, and the shared aesthetics and points of view of the interacting donors and recipients (Bakhtin 1981:276). These players consensually negotiate (depending on level of participation and the strengths of the ideological and economic forces) a set of objectives that serve as efficiently as is possible the needs of both parties. These needs include the desires

to give, to display and to steward, the need to design or implement the material, structural, and programmatic needs of an institution, and the reciprocal feedback that informs the satisfaction or dissatisfaction of the parties involved. These socially dialogic relationships find expression in sets of philanthropic acts achieving general or specific results be they intentional or fortuitous. The results are then applied: buildings built, endowments established, scholarships funded. Philanthropic products then enter a dialogic and historical evaluation and discernment process that interprets and analyzes the impact of the gifts and the social relational repercussions on the donor and institution in terms of donor recognition, planning objectives served and mission fulfillment.

Philanthropic success is the product of a problem solving discourse which at Chautauqua is mired in complexity because of the significant variety of gifting opportunities. And donors can seed the pot, but like anything else in life it is not a guarantee that living things will sprout. Chautauqua in its last three campaigns has closed over goal and in the Chautauqua Challenge campaign received unexpected gifts of over a million dollars. Historically, philanthropy at Chautauqua has succeeded and failed. Its current philanthropic state is healthy and if it continues should remain sound for the foreseeable future.

Transitioning from definitions to the field, the following develops the story of how Chautauqua employs philanthropic strategies to keep participants satisfied and the Institution on sound financial footing. Philanthropy at Chautauqua reinforces and protects shared types of morality, ethics, values, and ethnicity that donors believe are reinforced through their philanthropic participation. Mauss reminds us about how boundaries between domains are permeable: “All these phenomena are at the same time juridical, economic, religious and even aesthetic and morphological” (Mauss 1990:79). Philanthropy provides the funds for programs,

maintaining the buildings and grounds, and supports the staff while contributing to the future security of the Institution by building endowment funds at the Chautauqua Foundation. It is a philanthropy that is politically obligatory, genteel, heartfelt, culturally transmitted from one generation to the next, and charged with significance and civic and emotional power. The philanthropy at Chautauqua is respected, well cultivated, soundly solicited, and the Administration is trusted to spend donor funds responsibly.

Keith Basso states: “Selfhood and placehood are completely intertwined. Having developed apace together, are positive expressions of each other, opposite sides of the same rare coin, and their power to ‘bind and fasten fast’ is nothing short of enormous” (1996:146). James Mando, Director of Planned Giving, reinforces this concurrence noting the uniqueness of Chautauqua versus colleges, hospitals, etc. “Giving to this place adds a special flavor to the philanthropy because there’s no other place like it. People tend to drop other causes before they would think of dropping Chautauqua as a place to give”. Its uniqueness and functionality make it attractive and easy to identify with.

The Institution would be a shadow of its current self had it not been for the vigorous reorganization of its philanthropic efforts. Chautauqua has been completely revitalized. Between 1970 and 1996, the grounds have been repaired and restored; the year round executive staff went from four to seventeen; the annual fund rose from an average of \$100,000 to \$1.9 million (\$3,111,734 in 2010)⁵²; the Board of Trustees are nominated for their expertise and rigor versus traditional family affiliations; three, five and ten years plans have been developed and implemented; philanthropic morale was up; program quality was up; philanthropy has credibility (not just money down the drain), and upkeep endowments are mandatory with any gift requiring maintenance. Chautauqua is independent from any federal or state funding and has reestablished

itself as a cultural and economic force in Western New York.⁵³ Major campaigns since 1978 (through 1996) have raised over \$39 million dollars to institute major renovations, restorations, new facilities, and to insure future financial stability.

The Institution made public its “Design for the Decade” in 1991.⁵⁴ This document was basically a detailed “needs statement”. The campaign to follow was designed by the Development Office, Chautauqua and Chautauqua Foundation trustees, Administrative staff, and volunteers; to raise the funds necessary to fulfill specific needs and to open the door for future campaigns. At the time Tom Becker was the Development Director, Dan Bratton Institution President, and the Foundation Chair was Richard Miller. These three individuals were key sources of information in my research. Much of the information on the campaign is condensed from interviews with Becker and from the helpful and detailed “The Chautauqua Challenge Campaign Volunteer Handbook” (1993a). The Handbook provides step-by-step procedures for volunteers to follow in preparing and making a “Call” for a contribution and how to follow-through to complete the philanthropic process

The “Design for the Decade” was a document marking progress. From the work largely initiated and lead by Chautauqua Foundation Chair Richard Miller since the mid-1960s, the Institution has rebuilt itself into a financially sound and forward-looking organization in contrast to the stasis oriented Institution of the prior thirty years. The leadership of the Institution, the governing boards, the management and educational staff were stable or becoming established. The Chautauqua Foundation and the Institution had come to what Miller called a “new structural relationship” that placed the majority of the philanthropic development with the Foundation instead of the Administration. The buildings and grounds were in relatively good condition and the majority of the private property owners had made significant investments in their property.

Successful organizations depending on philanthropy; colleges and universities for example, are either in a campaign or planning for the next one. This work accomplishes any number of things; it grows the organization in new directions either by adding to or rehabilitating facilities and grounds, adds endowments to relieve operating costs or can retire debt or replace depreciating equipment. In Chautauqua's case, the Institution had never really had financial stability, they were either bonding debt to expand, paying off debt to stave off creditors, floating from one season to the next on a semi-contingency basis or conducting campaigns to solve specific problems facing the place. Emerging from a decade of relative financial stability, it was time to move the Institution into new directions. Careful study of the donor base, assessment of the condition of the grounds and recognizing that for the first time in over 60 years the Institution was in a position to expand again, the joint board decided to go into a fresh campaign. The Chautauqua Challenge Campaign was their step forward into long term and sustaining revitalization and growth. They began with the "Design for the Decade".

The "Design for the Decade" was the result of years of planning. It represented a concrete, ten year vision of its future. The "Design for the Decade" was the master plan for the campaign. The goals are quoted here:

- I Maintain and strengthen the current mix of programming, assuring both vitality and excellence;
- II Preserve, restore and maintain existing facilities and plan for others as needed.
- III Accomplish planned growth in Chautauqua's attendance.
- IV Acquire and develop land to meet goals of program, facilities, finance and attendance growth
- V Maximize planning for ongoing philanthropic support through annual giving, endowment growth, and special projects.
- VI Using historical and current information, appropriate planning processes, and effective governance, manage Chautauqua within planned resources. [1991]

The “Design for the Decade” addressed program development, facilities, marketing, land use and development, financial resources, and management and administration. The Chautauqua

Challenge Campaign’s objectives based on the “Design for the Decade” were twofold:

- To secure and enhance every area of programming, principally through a balance of increased annual operating funds and larger permanent endowments; and
- To renovate and restore several facilities, construct a new recital/rehearsal hall, and improve the grounds in keeping with a comprehensive environmental management plan. [Chautauqua Challenge Campaign booklet 1993b:12]

Below the monetary amounts set to meet the individual demands of the plan follow the amounts actually raised. The majority of the goals were met or exceeded, a few were not met. The goal of the campaign was \$22,500,000 while the final amount of the dollars raised exceeded that goal; \$24,163,015 or \$1,663,015 over goal:

COMPREHENSIVE	Goal	Raised
Chautauqua Annual Fund 1991-95	\$7,100,000	\$7,158,424
Unrestricted Endowment	2,900,000	6,506,485
Flexible Endowment ⁵⁵	900,000	1,391,820
Environmental Endowment	100,000	99,535
AMPHITHEATER		
Amphitheater Endowment	\$1,000,000	\$594,913
Reconstruction of the Massey Organ	600,000	660,999
Organ Endowment	100,000	100,000
Replace Amphitheater Seats	245,000	68,442
LECTURES AND MUSIC PROGRAMS		
Lecture Platform Endowment	\$2,000,000	\$1,102,256
Symphony Endowment	2,200,000	1,817,128
Opera Endowment	500,000	548,305
NEW MUSIC FACILITY		
Recital/Rehearsal Hall	\$1,700,000	\$1,894,589
Recital/Rehearsal Hall Endowment	100,000	100,000
RELIGION		
Religious Programming Endowment	\$400,000	\$114,830
SCHOOLS AND YOUTH		
Faculty Chairs Endowment	\$800,000	\$400,000
Scholarship Endowment	600,000	522,328
Youth Programming Endowment	200,000	121,290
Children’s School Renovation & Expansion	455,000	587,483
Youth Facilities Endowment	350,000	123,779
LIBRARY		

Archives Facility Renovation & Expansion	250,000	250,410
TOTAL CAMPAIGN	\$22,500,000	\$24,163,015

The plan required estimating costs of the various needs and setting those costs as goal amounts.⁵⁶

Illustrating the social relational aspect of Chautauqua's philanthropy through detailed research into their donor base, estimates are made on how much can be raised based on a donors' financial status and history of giving. Donors are tracked through information stemming from the annual Chautauqua Fund and participation in previous campaigns: spouse's name, where they live, children, college, annual income, gender, objectives, financial worth, personal views and experiences at Chautauqua, family background, business paths, outside (of Chautauqua) interests, education, boards served, stocks, age, bank, "ties to Institution", current activities, other charities supported, contact method, record of contact made, previous gifts and potential for future gifts, preferences for restricted funds, flexible funds.⁵⁷

Donors become intimate others whose ideologies and idiosyncrasies are sought to discursively align their interests with Institution needs. The task force assigned to identifying potential prospects has five functions:

1. Prospect Identification: to identify potential donors for the Chautauqua Fund, the Planned Giving Program and for Campaigns.
2. Prospect Gift Rating: to identify the prospects financial capability and to assist the staff in determining the size of the gift which should be requested.
3. Solicitation Strategy: to identify a prospect's special interests from which an effective solicitation strategy can be developed.
4. Solicitor-Prospect Matching: to identify the proper solicitor(s)/volunteer(s) to approach the prospect for a gift.
5. Volunteer Identification: to identify volunteers for the Chautauqua Fund, Planned Giving Program, committees and task forces. [1993a]

There was a great deal of planning, research, and communication among the

Development

Office,

volunteers, the

Foundation, and

the

Administration to

make needs, the

price tags on

asks,⁵⁸ and the

CHAUTAUQUA CHALLENGE CAMPAIGN ANALYSIS

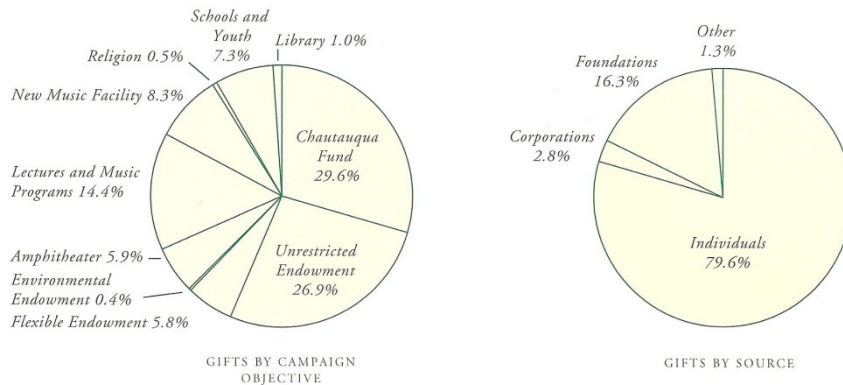


Fig 4-1 Chautauqua Challenge Final Report: 1995:4

donor resources match. A well-planned campaign requires this. Chautauqua underestimated their donor base, and along with a surprise \$1,000,000 donation,⁵⁹ they finished the campaign \$1,663,015 over goal (\$5.00 was mine!).

The Chautauqua Foundation along with this campaign and its annual fund raising efforts has a number of methods for receiving funds. At the time of the study there were 44 unrestricted funds of at least \$5,000 and some as high as \$38,000 for use at the Institution's discretion. There were also a number of restricted funds designed to serve specific ends: buildings and maintenance, gardens and parks, program funds, lectureships, the library, endowments for the performing arts, religious programs, schools administration and scholarships, and youth activities. The Foundation has many ways to receive gifts: cash, appreciated property, life-income arrangements; annuity trusts, charitable remainder trusts and charitable lead trusts, pooled life income funds, and gifts of remainder interest in a personal residence unitrusts (in which property or money is donated with a tax deduction, but the donor continues to use the

property and/or receive income from it while living). Bequests from estates and wills insuring an ideology will survive death can be specific; can be given in the form of a percentage of the will or estate, can be residuary bequests or contingent gifts (property remaining in the estate of a deceased person after all the special gifts notified in the will were made), and may also be structured as restricted bequests for a particular endowment or program. Chautauqua is also a primary beneficiary of life insurance policies. Their annual fund of roughly 2,800 supporters relied on the gifts of some 350 donors for 83 percent of its income.

Chautauqua's donor base is not solely made up of wealthy individuals and families. Adding to the heterogeneity of the mix a large proportion of the funds come from the smaller donations from the middle class families who make up the majority of the property owners and the 183,000 annual participants (Chautauqua Annual Report 1992). How the Institution maintains its relationships with this large donor base, carries out the wishes of those who give, monitors their level of satisfaction, renders services, and solves their problems is addressed below.

Nuts and Bolts of the Campaign

The Chautauqua Challenge Campaign was publicly announced at the opening ceremonies of the 1993 summer season. Prior to the public announcement more than half of the funds had already been solicited in the “lead gift” phase. This is a standard practice in running campaigns. Initial donors are solicited for gifts to “prime the pump” so to speak as starting a campaign from zero dollars presents a negative image. Reg and Betty Lenna had committed \$1.8 million dollars to build a new rehearsal hall on the grounds. It was the first in new building at that point in 63 years. In combination with the Lenna gift the campaign started out with 53.7% of the goal raised

in the pre-public lead gift phase (6/91 - 12/92). This amounts to \$17,358,910; which included all gifts not just lead gifts (i.e. includes the annual fund and the smaller gifts that were raised in the 'lead gift' time frame).⁶⁰

Capitalizing on the exact timing for the campaign to go public was well planned. President Bratton credited an “orderly Development office”, being up to date in respect to data management that permitted the planning to realize the philanthropic potential of Chautauquans. The office’s steady cultivation of prospects needed constant nurturing, philanthropic success won’t happen on its own. They had realized a few years prior that they were missing significant opportunities as people were not approached on estate planning. They began that process and had \$10 million in the pipeline (1996) that wouldn’t have been there without it. The Development office has a programmer who runs regular reports from data bases that track donors and volunteers. Eighty percent of the dollars donated came from 1,000 donors. They had an index of Chautauqua families in their archive. Internally the office keeps track weekly on the Chautauqua Fund goal and tracks it in comparison to previous years. The programmer’s major responsibility is inputting contributions making sure the funds are allocated correctly—restricted and unrestricted endowments to go where the donor requested they go; communications with finance office; answering staff requests; insuring the status of volunteer reports are updated and accurate; and adding new donor statistics. They send personally signed thank you letters to every one of the 6,000 donors from 50 cents to a million dollars.

David Williams then Director of Chautauqua Fund saw an average of \$1.4 million a year coming into the fund. The annual fund pays for year-round operating costs: salaries, heat, grounds, etc. The administration and Chautauqua Foundation board felt that the fund could no longer afford to pay into endowments. The \$25,000 and up donors were into capital projects, the

Pooled Life Income fund, and endowments when historically those funds were lumped into the Chautauqua Fund. Development Office data said that donors want to know specifically where their money was going. Here funds used to be distributed to be the entire program, but in campaigns donors can make choices about how their money is put to use.

Over the five years prior to 1993, there was a trend toward a “cultural Disneyland” where the gate fee was all that new people felt they needed to pay. There was no giving from this group. “Chautauqua needs philanthropy to make up for this mentality”. The question becomes: “will new families become philanthropers”? Will they develop the emotional bonds from a short stay that others developed from long ones? A duty of the development at the Institution is to cultivate and educate the children at the youth clubs and younger families who cannot get away for longer stays. This group of potential new donor/visitors needed to develop a sense of obligation to give to Chautauqua that the long-term Chautauquans have as a matter of course.

President Dan Bratton emphasized in an interview that 10 years prior (1983) there was the “armed camp” mentality pervading Chautauqua donors. He worked to communicate a sense of community and a clear sense of where the Institution is going. When he arrived here there was a year-to-year approach toward funding with a few donors attempting direct control. It took time to make clear that the Institution needed increasing amounts of funds to create a stable financial future. Sound management was the way to accomplish this. Having a plan like the “Design for the Decade” cultivated confidence in the future providing a clear sense of where the Institution was headed.

The campaign was fundamentally designed in the Development Office but for the most part was carried out by Chautauquans. The Foundation, Tom Becker and his development staff, the Administration, Board members of the Foundation and the Institution all played significant

roles both as planners and organizers. Robert Osburn was the campaign chair and Bill Karslake who chaired the Chautauqua Fund's annual campaign were both long time Chautauquans with extensive volunteer histories. There was an accompanying high gloss literature campaign. But the actual talking, visiting, "asking", all the footwork; was carried out by administrators and seventy-nine volunteers. These were individuals with long-term and numerous associations with the Institution: past and current Board members, old and new family members, administrators, and property owners who fully back the Chautauqua Challenge Campaign.

A great deal was expected of the volunteers to signify their commitment and self-investment in Chautauqua. They were required to know the details of the "Design for the Decade"; participate in multiple solicitation planning sessions; positively promote Chautauqua and the campaign in all contacts with other Chautauquans; schedule and make roughly five calls a year; achieve closure and complete contact reports; support the campaign themselves through personal philanthropy; and attend volunteer meetings and campaign functions as appropriate. This commitment of time and effort reveals an ideological confluence between the Institution and Chautauquans. They represent how successful the mutual integration of ideology can be by the sheer weight of the task and responsibility they publically took upon themselves to help the Institution. Also, evidence of concrete social relations that build on place.

The volunteers were organized into "Teams", made up of eight-to-ten individuals. Each team was headed by a "Cabinet Member" who was responsible for the teams' work and includes a staff member from the Development Office. Two volunteers call on the campaign prospect(s) assigned. These individuals are assigned to them but that assignment is based on the volunteers' personal acquaintance with the potential donors and a sharing of similar interests and financial bracket with them. The alignment is important to establish rapport and trust and eases the

discursive awkwardness that might accompany a mismatched set. These choices exemplify the interrelationships reflecting the values and ideologies, and the shared aesthetics and points of view of the interacting donors. If the donors are a couple, a couple made the call. It might have taken separate “Husband only” or wife “Talk to me first” calls as determined by the data at the Development office. If there is wealth on both sides, they made it a double ask.⁶¹ If gender is important per interests, they approach her and her interests; perhaps create a named fund for a stamp like recognition. Some didn’t go for this. If a spouse died in the recent past, they might ask for naming gift in deceased spouse’s name to remember them.

These networks of individuals in social relationships had already established a history of giving to the Institution and were therefore embedded in the cycle of reciprocity of giving, receiving, and giving. Sperry notes Johnson’s examination of reciprocal gift giving as a representation of one’s social networks. The nature of giving changes as intimacy varies between donor and volunteer (Sperry 1983:161; Johnson 1974:300-301). Volunteers need to be closely acquainted with donors to insure credibility of the process and the sincerity of the ask.

Making a gift is a prerequisite for being a campaign volunteer. It is important for them to have seriously deliberated over why they are giving and for what purpose. Bakhtin would call this evidence of the assimilation of an *authoritative discourse* or an *internally persuasive discourse* (Bakhtin 1981:272, 282). Having been through the voluntary indoctrination of the Institution’s discourse, the volunteer has been persuaded with sufficient force to undertake the mission of the Institution and to internalize the discourse of philanthropy. The discourse itself in this way gains authority and power and carries enough evidentiary conviction to make the potential volunteer an active donor and campaign participant. The majority of these individuals have been giving to the Institution and been philanthropically active in their “outside” lives.

Having gone through the evaluation process themselves gives them the knowledge to anticipate and answer the types questions related to the discourse of giving to the Institution. As mentioned the volunteer was usually a friend or family member of the prospective donor with similar financial resources; or had some special skill or sensitivity that would better the chances of the ask being successful. Similar levels of giving also match volunteers to donors. “Remember — be sincere, be natural, be yourself when talking to a prospective donor; let your positive attitude show through! Tell him/her why you gave” (Chautauqua Volunteer Handbook 1993a:VII-3). Lowering defense mechanisms serves to remove doubts and open the door to the type of positive deliberation that leads to a substantial effort of giving. Their persuasive and shared discourse is negotiated and transferred to become internalized by the targeted donor.

The management of the volunteer process involved numerous meetings, rules and procedures, and follow-up diagnostics of asks and events. The Development office knows what their volunteers are doing, who they are meeting with and what successes and failures they have encountered. Campaigns rely on courtesy, credibility and sincerity. To keep everyone organized there were two team meetings a season for campaign updates and to review calls made and to discuss problems. The volunteers reported regularly on their progress. Contact reports, a four-part form, were completed by the lead volunteer after contact with a potential donor. The report includes the specifics: information on whether the volunteer changed the amount of the ask or the particular gift a prospect was targeted for; additional or corrected biographical information; donor reactions to the campaign; commitment from the prospect; and information on proposed follow-up.

Lead volunteers were expected to keep up a stream of correspondence with their potential or actual donors. A note was always sent within a few days of the solicitation restating the ask

and any commitments made by the donor. Copies of the correspondence was sent to the Development office. Staff or team captains were available to help volunteers on follow-up calls.

The size of the ask is “almost always” within the “financial potential” of the donor. At times the ask is larger than what the donor might have expected. Part of the plan it to “stretch individual horizons” in regard to philanthropic giving to the Institution. This demonstrates the elasticity of the discursive process to push and invite the donor into a more expansive interrelationship with the Institution. “When this occurs, it invariably brings great satisfaction and a sense of meaningful participation in an organization in which the family deeply believes” (Chautauqua Volunteer Handbook 1993a). It is also a mistake to make too small an ask: it is a missed opportunity. And too small an ask can be perceived as a slight when one wants to be thought of as able to give more.

There was a “Giving Strategy” designed by the Development Office that balanced the giving during the five years of the campaign between the annual Chautauqua Fund (included in the \$22.5 million total), and the specific gift used to forward the goals of the campaign. As the Development office has a record of the past gifts and interests of a donor, the ask is designed to match one of those interests. Here is the hypothetical example from the “Handbook”:

Donor: Wilbur and Sophia Rand

Chautauqua Fund History:	\$1,000, 500, 500, 250, 150
2nd Century:	no record
Endowment Campaign:	\$5,000 scholarship

Known interests: orchestra, opera, Music School Festival Orchestra, chamber music

Suggested strategy:

Chautauqua Fund:	
\$2,500 a year for the duration of the campaign	\$2,500 per year

Named scholarship fund of \$25,000 within the endowment to support music students through gifts to the endowment of \$5,000 a year for the next 5 years:	\$25,000
--	----------

Will provision: Add \$25,000 to their named scholarship fund through a bequest	\$25,000
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Alternate suggestion: \$25,000 gift to Chautauqua's Pooled Life Income Fund, which ultimately could be used to underwrite a named scholarship fund.

Recognition opportunities: Named fund within the Foundation, noted in the campaign report, Foundation Annual Report, listing in the Annual Report of the Institute as a Bestor Society member. [Chautauqua Challenge Campaign Volunteer Handbook 1993a:VII-2]⁶²

If this ask had been successful the Rand's would have upped their gift from a total to date of \$7,400 to a \$62,500 gift. Nice mark-up or "stretch" as the Development Office likes to call it.

Many of the asks made these stretches and were honored by the donors.

There were six major ways to give to the campaign:

- 1). Gifts of Cash.
- 2). Gifts of Securities: shares of stock of public companies. The advantage to giving stock is avoiding the taxes on the capital gains plus a charitable income tax deduction on the current fair market value of the securities.
- 3). Gifts of Closely Held Stock: shares of private stock at full fair market value. This can generate a sizable full value income tax deduction in cases of individually or family owned businesses especially if the stock began at a very low value and then appreciated greatly. As with public stock, the capital gains taxes are avoided and this kind of gift is particularly attractive because of the large appreciation in value. The income tax deduction at the time was limited to thirty percent of the donor's adjusted gross income for that year.
- 4). Gifts of Life Insurance: the idea behind this gift is if it works for the donor; if getting children through college, or paying off a mortgage are no longer issues, making the Institution the beneficiary can make sense. Making the Institution the beneficiary or making an outright gift will allow for disbursement of the funds and an accompanying tax deduction for those with cash value.
- 5). Gifts of Real Estate: personal or vacation homes, farms, condominiums or undeveloped land.
- 6). Bequests: a gift of any kind made outright in a donor's will. Life Income Arrangements is a trust set up where the donor (and spouse or other beneficiary)

is the beneficiary from their own assets and in the end the Institution becomes the beneficiary of the trust's assets.

John Sperry notes that gift giving occasions can be highly formal structural events marked by ceremony and ritual along the lines of Old First Night where the first Tuesday of August is set aside for a fund raising event including all the clubs and organizations at Chautauqua. These can also be small “social decorum (where token giving and hospitality figure prominently)” events like those practiced by



Fig 4-2 Chautauqua Challenge Final Report: 1995:9

the campaign volunteers between individuals when new alliances are formed or old ones are strengthened (Sperry 1983:162). Volunteer trainings are held where asking strategies are role played to increase the requester's confidence in the process and to make them comfortable with their presentation. Team captains and the campaign chair are available for last minute advice and fine tuning. The process begins when an appointment is made asking the donor to schedule a visit and discuss Chautauqua's plan for the future and the donor's potential financial role in the campaign. They were to ask for roughly an hour and a half to two hours for each visit and were expected to bring a case statement, pledge forms and Institution data. They never operated in a vacuum. The campaign had been publicly announced and potential donors were expecting an ask. In one case where a relative newcomer to the Institution had been missed, she felt slighted and disappointed for not being solicited. An invitation to give is recognition of belonging to the larger Chautauqua community and a sign of one's status.

The actual call is preceded by a video sent to the prospect that was designed as an ice-breaker. The initial conversation starts off by talking over the video and then onto the campaign. The volunteers discuss their own experiences as Chautauquans and as donors in a world of numerous philanthropic obligations. Donors are known for making a ‘pre-emptive gift’ early in the conversation that is generally lower than what the Development office has determined as being up to their estimated potential. The volunteers are instructed to say that it is too early for that part of the discussion. They press that the donor needs to hear the whole story first. The case statement is gone over and then questions and answers follow.

When the actual ‘ask’ takes place it begins with a request for the Chautauqua Fund as the first step in a five-year gift. The donor is thanked for past donations. Then a proposed endowment or capital project is reviewed, and when appropriate, estate planning is also considered. Emphasis is placed on the importance of the gift for the long-term health of the Institution.

The Volunteer Handbook stresses: “After you have made the special ask, you should remain absolutely silent” (1993a:X-2). As the donor begins to make comments, state concerns or ask questions the volunteer is to remain neutral and not get angry or defensive should the donor become riled. Answers are to be supplied calmly and if the volunteer did not have an answer, he/she agrees to find it. After the conversation has taken its natural course, the various naming and memorial opportunities are detailed. Donors who do not like what they have been offered to support will have their desires pleasantly noted, but not confirmed. Generally, no commitments are sought at this juncture, especially on major gifts. The campaign materials are left with the prospect and a follow-up contact will be made within a few days. Closing statements generally contain small talk about family, program, Chautauqua.

After a meeting between a volunteer and a potential donor the contact report was then updated and a thank-you note was sent including the specifics of the ask. At the next meeting, the prospect after having time to deliberate and consult with family and friends, usually makes a commitment to the campaign

I was never party to these interactions as I would have interfered with the intimacy necessary to the direct fundraising of the campaign. This was my agreement with President Dan Bratton and Development Director Tom Becker. I cleared my interview list with Mr. Becker before contact not wishing to jeopardize their objectives and create negative rapport between myself and those assisting me. A little ethnographic give and take. I was provided with information on how things took place, but was not allowed to be an obstacle to the procurement of campaign objectives. The asks were highly personal interactions between friends or peers, there would have been no way for me to observe without meddling or interfering with that process. My archival research and interviews provided the understanding of the commitment to fund raising as the future of Chautauqua from the perspective of the institutional representatives and to investigate the desire to give on the part of Chautauqua residents. Some of the philanthropic stories that emerged are detailed in Chapters 6 and 7.

As like-Chautauquans share similar interests, values and program elements, reinforcement of the ask and the feeling of commitment emerges in casual and social gatherings, performances, and lectures. Each Chautauquan becomes a living reminder to others of the interrelatedness of their donor community and an ask is backed up by expectations of this social reinforcement or sanctioning. If an individual doesn't give, they are going to have to face their fellow Chautauquans in their niche, reminding them overtly or not that they did not give or did not give to their potential. I was never part of the inner circle or invited to campaign events.

Donors must have known what ball-park each other's giving was in from campaign publications and recognition therein, but to come right out and talk about the size or amount of their gift seems unlikely. There may have been a braggart or two, but my sense from mixing with these individuals was that it would have been inappropriate to outwardly discuss or compare gifts unless they were giving to the same objective and concerns arose regarding meeting their goal. The philanthropic subculture at Chautauqua was genteel and the process surrounding the cycles of reciprocity displayed respect, gratitude, and affection. Nonetheless there was a foundation of recognition that the success of the institution derives from the giving of its patrons, status, identity, and prestige follow giving (Silber 1998:135).

The Recognition Process



Fig 4-3 Headline Chautauqua Daily pg. 6. 8-1-95

It is standard practice in well-run campaigns to sufficiently thank and publicly recognize donors and their gifts. Donors expect and deserve recognition; it is part of the reciprocal process (Sperry 1983:165). High visibility is evidence of the Institution's gratitude and that of the community sharing the gift. It is an expression of gratitude that reaffirms the social bonds and relationships between the Institution and donors that also pave the way for future gifts. The recognition process is also a public relations strategy. When well-known Chautauquans are seen by others as donors, it is acknowledged as an endorsement of the campaign's objectives. It adds

credibility to the campaign that cannot be achieved in any other way and in some instances it might be the supporting evidence that nudges fence sitters into giving.

The campaign is wide in scope and the Development office ensures that all gifts are recognized: Chautauqua Fund, endowments, capital gifts and planned giving.⁶³ In order to keep the Chautauqua Fund and the Bestor Society from falling into a secondary position to the Chautauqua Challenge Campaign, mailings are used to maintain their traditional visibility, ads run in the *Chautauqua Daily* newspaper, and recognition dinners and galas honor donors. Keeping the public and potential donors aware of naming opportunities and planned giving is part of recognition. Also, publicizing who has supported specific objectives provides another avenue for educating the Institution's public about the campaign and its goals: it keeps the discourse alive. This may encourage other donors in the solicitation process to go ahead with their gift or increase its value. Identity in the community is keenly related to the type and size of gifts given (Silber 1998:138). Mauss reminds that gifts are not given in isolation, but cross a number of cultural barriers being inclusive rather than divisive (Mauss 1990:79). The philanthropic community at Chautauqua is not large and many members are related through marriage, friends, church or neighborhoods. The gift they give is a public statement of what they value to each other and to the Institution.

Recognition is disseminated in the *Chautauqua Daily* that has circulation of 6,000 per day. The most wide reaching vehicle for recognition was the *Chautauquan*, a quarterly publication sent to everyone on the Institution's mailing list of over 20,000 at the time of this study. The *Institution Annual Report* that has a circulation of 3,000 was sent to all Chautauqua Fund donors, trustees, and directors. The *Foundation Annual Report* was sent to over 600 contributors including the trustees, directors, and those in the planned giving program. Both

reports are available online. The *State of the Challenge* newsletter is sent to all donors as is the *Campaign Final Report*.

During the time of my research from 1992 to 1995 The Bestor Society listing was published twice during the summer season in the *Chautauqua Daily* and in the *Institution Annual Report*. A list of the donors with a cumulative total of their gifts appeared once in the *Chautauqua Daily*, the fall *Chautauquan*, and the final report. Specific articles on particular donors and their gifts appeared in the *State of the Challenge* newsletter. Recognition of participation in the Planned Giving Club is published regularly in the newsletter, the *Institution Annual Report*, the *Foundation Annual Report* and one issue of the *Chautauqua Daily*.

The recognition system was set by giving levels without titles that include the total amount pledged for the campaign through 1995. Individuals had the option of moving up though giving levels noted in the publications.

\$1,000,000+
\$500,000-1,000,000
\$250,000-500,000
\$100,000-250,000
\$50,000-100,000
\$25,000-50,000
\$5,000-25,000 and
less than \$5,000

Recognition can also be a social event. The Bestor Society dinner is an annual event of significant proportions. Some donors have mailed their invitations back arguing they wanted their money to go to the Institution and not to lavish dinners. Donors are also cultivated at special gatherings and receptions at the President's house and the homes of trustees, and volunteers. The overall cost of administering Development activities in 1994 was \$439,372 and in 1993 \$388,589.⁶⁴ There are also lunches, dinners, and receptions with particular lecturers or

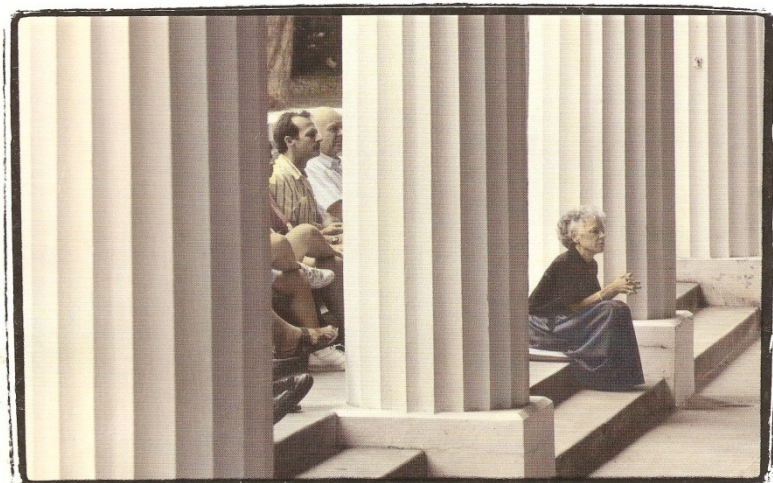
performers in whom a donor has expressed interest. Special tours of program areas are arranged. Golden shovel ground breaking dedications of various capital projects are also points of recognition.

The Case Statement

The campaign literature is made from high quality papers with glossy textures. Photographs symbolize the integrity and grandeur necessary to reinforce and continually forge an affirmative view of the

Institution. The campaign literature is designed to persuade through opulent salesmanship. The front cover of the Case Statement, the campaign's strategy and goals outline, is a power statement. Its

THE CHAUTAUQUA CHALLENGE CAMPAIGN



Gathered, Each to Give and to Receive

Figure 4-4 Cover of Chautauqua Challenge Campaign Case

focus is on a graying woman distinctively positioned listening to a lecture between two of the massive columns of the Hall of Philosophy. Her hands clasped in quiet dignity, against the Parthenon-like strength symbolizing the power of the Chautauqua experience.

The text opens with a heavily edited letter from the then Chairman of the Board of Trustees, Thomas R. Bromeley, the Campaign Chair Robert B. Osburn and Institution President

Daniel L. Bratton. “Engage in Chautauqua, and you become part of a community where people believe in something . . . Chautauqua is a place and a program, and it is also an intangible spirit – a collection of many human gifts, shared and spread out among us.” This smooth, persuasive, tone permeates the text (1993b).

The next few pages contain individual testimonials from prominent Chautauquans. These testimonials are spliced together with appropriate photos to tell a story of the place that touches on first introduction, definitions, the arts, performances, intellectual challenges, personal enlightenment, spirituality, and philanthropy. Keith Basso reminds us that: “Selfhood and placehood are completely intertwined. Having developed apace together, [they] are positive expressions of each other, opposite sides of the same rare coin, and their power to ‘bind and fasten fast’ is nothing short of enormous” (1996:146). Handling and reading the Case Statement reinforces direct perceptions of Chautauqua’s surrounding and beauty. This has to be a key factor in making asks of donors while they are on the grounds. The place is not abstract; it is present mirroring the interior values of the donor as a living present allegory.

The text surrounding the images works to massage image into story to assist the reader in recognizing themselves in the overall context of the Chautauqua experience. It evokes trust and honesty that encourages a living identification with the subject matter. It works to assuage doubts by clearly and eloquently stating what is beautiful, dynastic and spiritually uplifting that crosses the borders between what the individual harbors as personal sentiment into the secular and hallowed that is the Institution:

“A spa for the mind . . . the very bright people who attend the lectures are there and listen carefully because its their nature. . . . Chautauqua is holy ground, sacred ground . . . Being children of a creator God, we in turn are called to be creative in our lives — whether overtly, as through the arts, or more personally in interpreting and understanding our life experiences . . . Being a Chautauquan is a statement that means something . . . It is bred into the bone that this place needs nurturing and caring for . . . What’s involved in

being a steward of a place with tradition is balancing stability and change; making certain that the complex, fragile, terribly important mix of things that make Chautauqua what it is are not lost or passed to a new generation that doesn't understand it." [Chautauqua Challenge Case Statement:1993b]

And so on.

The Case Statement reminds the reader the value of what the Institution has given to them, and now it is their turn to give back to Chautauqua. The campaign's goals are outlined in comfortable prose surrounded by images of Chautauqua settings. The final two pages state the goals in monetary terms and provide the list of the individuals composing the "campaign leadership".

The troubling but hardly surprising part of the Case Statement is that it reflects the Institution all too well. But for one picture, three pages from the back of a young Africa-American girl playing with two other white children, the Statement's pictures are of white people. Chautauqua is a white place. For now, for fear of challenging that sense of place as prospects know it, people of underrepresented

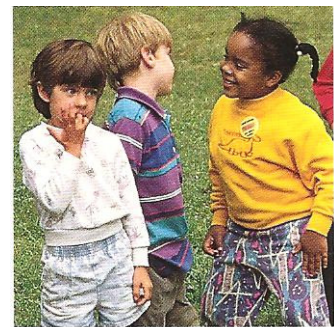


Fig 4-5 Case St. pg 18

ethnicities at Chautauqua are omitted from the Case Statement. Who is not represented is a statement saying who is not part of Chautauqua as much as it is a declaration of who belongs. The expectation is that those funding the place are not open to inclusion in ways that will change the hegemony of the white majority. This is an implicit dimension of the campaign literature and was not a topic on which I could gather information directly. Yet the omission itself makes the case.

The motives, ambitions, contexts, situational and mediating influences, and the flow and counter flow of reciprocation all influence philanthropic relationships and outcomes.

Philanthropy can deliver change or provide stasis; it can serve social, political, religious, educational, artistic, health and civic needs. Francie Ostrower reminds us that philanthropy can be unabashedly self-serving where donors are purchasing the type of social environment or backing an institution or activity that reflects what they value (1995). Trobriand Island chieftains were perfectly aware that the red shell necklaces and white shell armbands they exchanged as gifts helped maintain the social status quo while being a vehicle for self-promotion and the stage for exhibiting prestige and political power (Malinowski 1922:100-101). As Sandra Barnes notes, energy concerns are now becoming the common goal for strategic philanthropists to serve their own economic interests (2005). And while philanthropy at Chautauqua works to preserve the values of the Institution, giving may also advocate for changes that will shape the future of the Institution in a host of anticipated directions and may also result in unanticipated change. Philanthropy is a horse rocking between centripetal and centrifugal forces enacting private visions of the public good (Frumkin 2006:136).

The Chautauqua Challenge Campaign provided the epicenter of my study. Happenstance provided the concurrence of starting my fieldwork and starting the campaign. The campaign being underway opened the doors of many Chautauquans who were ready and willing to share their stories in ways that clearly benefited the research. In the final chapters I will synthesize the narratives of Chautauquans as they pertain to philanthropy. I will also develop and integrate the perspectives of the three theorists with whom I opened the dissertation and whose narratives have given structure to the flow of this dissertation.

Chapter 5

The Structure of Chautauqua's Philanthropy: The Miller Revolution

Nearly every interview I conducted included tribute for Richard Miller, great-grandson of Chautauqua's co-founder Lewis Miller. His story reverberates with the authoritative history behind the Institution's revitalization giving Chautauquans a powerful means through which to understand their own philanthropy and it is a lens through which to open considerations of the philanthropic process as it emerges dynamically among the Institution, its residents and long time visitors.

Following Denzin's methodology, field work pivots on finding the individuals who have a long history with a place, a community, and a set of cultural practices. It is these individuals who are intimately involved with the culture arena at stake. They are the key informants of a study (Denzin 1989a:80-81, 92; Bernard 1988:177-178). Their stories tell *the* story (Denzin 1989a:38, 144). The following is a case study for which "the analysis of a single case [is engaged] . . . for the purpose of description [and] . . . generalization of a theory" (Denzin 1989b:185). It is also an *intrinsic* case study for it is "because it illustrates a particular trait or problem . . . that the case may reveal its story. . . . intrinsic case study designs draw the researcher toward understanding of what is important about that case within its own world, not so much the world of researchers and theorists, but developing its [own] issues, contexts, and interpretations" (Stake 1998:88, 99). While I conducted 78 interviews for this work, Miller's is the seminal piece that the others reinforce. "We cannot be sure that a case telling its own story will tell all or tell well, but the ethnographic ethos of *interpretive* study, seeking out emic meanings held by the people within the case, is strong" (emphasis in original, Stake 1998:93)

and the potential to reveal much of the dynamics of a more involved process will come to fruition here. The following is Richard Miller's story as told to me in the summer of 1993 at his home at Chautauqua.

Richard Miller began to make changes in the organization in the mid-1960s by joining the Board of Trustees and then by becoming its Chairman of the Board in 1970. He instituted an annual fund that sought to realistically payout for the Institution's programming. Up to that point the Institution ran regular deficits and depended on philanthropy from a small number of donors to bail it out annually. He rebuilt the Chautauqua Foundation and turned it around from a largely symbolic entity into one that had assets of nearly \$38 million (1995) and produced almost \$1.2 million for running the Institution (1996).⁶⁵ Miller was Chairman of the Chautauqua Foundation from August 1971 to August 1996.

Miller and his wife Miriam Reading, another long-time deeply rooted Chautauquan, have their summer home on the Chautauqua lakefront.⁶⁶ Similar to my other interviews, I was admitted into the bustle of the family readying for the day, offered coffee, and then retired to a quiet spot for the talk. Miller has a powerful, if not intimidating, presence. I felt rapport develop over the course of the interview, but I never lost the feeling that Miller was calling the shots. His dog snored quietly at his feet. At the conclusion of the fieldwork, with dozens of stories in hand, I could see the overlapping pieces from others' narratives as they engaged with the themes Miller articulated. Again and again these themes emerge in philanthropic tellings but perhaps for no one is the detail and integrity as well articulated as in Miller's case.

I consider Miller the prime mover behind the revitalization of the Institution. He realized in the mid-1960s that Chautauqua was in a sink or swim situation and he took the initiative to bring the right ideas, people and resources together to begin rebuilding the Institution. His

family represented links to the Institution's founding, his expertise was in restructuring businesses, his prior involvement in philanthropy was sufficient to shape the policy needed to resurrect the Chautauqua Foundation and initiate successful partnerships with funders and to begin the fiscal and administrative turn-around of operations. In the early years of the 1960s and early 1970s Miller worked with the board of directors and cogently introduced sensible and well-timed changes that allowed the Institution to grow at a steady but consistent pace. By hiring motivated and creative individuals and by inviting new professionally and financially strong people to join the board of directors, he put in place the people necessary for sustained and then progressive expansion and growth of the Institution, its financial progress and a conducive system that drew new talent and philanthropy. I present his story as a pivotal core narrative of Chautauqua. He was responsible, in conjunction with others of course, but he was the prime mover that began the revitalization of Chautauqua. In the next chapter I will follow with an analysis of the many stories that converge on the projects introduced by Miller and explore the dynamics of individual giving. For now, here is the master story of Chautauqua told in a mix of Miller's words and my rephrasings. We collaborated to build this chapter and I include it here as Miller himself approved.

Miller is a highly adept individual: St. Paul's Prep School, Yale, Harvard Law, and a partner in one of the fifty largest law firms in the country based in Milwaukee. He began coming to Chautauqua in his mid-teens, staying at the Miller Cottage then held in the estate of his Great Aunt Mina Miller Edison.⁶⁷ He went through the socialization pattern of most long-standing Chautauquans: born to a family with ties there, worked at the Boys and Girls Club as a youth, went to college, held various jobs away from Chautauqua, hiatus as a young adult and then returning in his 30's with his family.

He became a Board member in the mid-1960s “. . . and I really can’t tell you what the logic for all that was. I suppose more than anything else it was family history.” He was the youngest trustee to that point to ever be welcomed on the Board. When Curt Haug, then Institution President resigned, Miller was chosen to chair the search committee to find his replacement. He then was asked to be the chairman of the Institution’s Board of trustees. His evaluation in retrospect was that he was chosen more out of “fear and anxiety” than anything else. The prospects for the Institution at that time were “pretty bleak” and the Board felt they were not going to attract anyone with more experience into the role.

Miller had had a number of years of active involvement in other projects and organizations that positioned him well for the job. He had worked with community organizations in Milwaukee and the Presbyterian Church up to the national level. “I had a fair amount of external background . . . and experience to give me some sense of what I was getting into.”

In 1970, the Institution was in such dire straits that its management was thinking in terms of survival over anything else. It had operated at a deficit eight of the preceding ten years, and was \$4 million in debt. Of the Board’s twenty-four people, the “vast majority” were retired, many having become fatigued and less efficient from being on the Board far too long. There was a sense of despair and stagnation across the organization that repressed optimism. The annual fund was at a paltry \$100,000, yet the Board felt at that time it was what they “were busting their buttons for.” There were only two full-time executive staff members (1995 was seventeen), the President and the Treasurer.

“The condition of the Institution was very very poor.” The Amphitheater was at risk of falling down. The general state of both private and Institution properties were run down. The

Victorian houses were in serious need of roofs, painting, structural repairs, and other renovations necessary for long term habitation.

Miller's first initiative in turning the Institution around was searching for a new president. Preceding presidents had been "relatively, (ah . . . cautious) un-star-like." There had been a couple of business men and a program director. The Institution had up to Miller's time a larger population that tended to make for long term stays, averaging around four to six weeks (at the time of this study was between three days to a week). That long term group had a "loyalty" to the most visible staff person's platform presence. Several years prior to Miller's arrival, Ralph McAllister was the program director, and wanted to expand the program in new and more expansive directions but "the trustees with business oriented leadership would dig in their heels and say no." Miller came on shortly after some of these tensions had been diffused by Curt Haug, who came from a YMCA background. But Chautauqua needed a more diversely talented individual to lead the Institution out of its decades-long rut.

The search begun in the academic arena discovered Oscar Remick, a former vice president at a college in Worchester, MA. Remick had a background in philosophy and was charismatic. He found Chautauqua attractive because it provided him with the opportunity to implement major changes. He was given the authority to design the program and he demonstrated the intellect to envision what the Institution was capable of producing. "The two of us made a very, very good team." Remick's expertise was programming, Miller's expertise was finance. Miller obtained the Board leadership to move the Institution in the directions that "he and I would agree the Institution ought to go."

The centennial was approaching in 1974, and they "capitalized on that as a chance to revitalize and reinstate the Institution's self-image." One of the first things they did was to draft

and lead the Board to adopt a mission statement that became the Chautauqua Challenge. It “articulated a general road map of what we thought it could be” (see Chapter 1 for the full text).

The first major problem was to gain acceptance by the community of their leadership roles. “Just because a self-perpetuating Board of Trustees makes you chairman of the Board or elects you as President of the Institution, does not say that you instantly command the community’s respect and loyalty.” They spent a lot of time involving themselves with Chautauquans to gain the community’s respect. Miller took a leave of absence from his law firm for the first season he was chairman. “I made it known that the President’s secretary could book my time in the Board room in the Colonnade for half hour segments, for anybody that wanted to talk on any topic.” This gave Miller a lot of exposure and a lot of “dandy ideas” and a “tremendous sense” of the capacities and capabilities of the people on the grounds.

This accessibility built a great deal of confidence among the general constituency who were mainly from families used to long term stays. “I also had my family background as a credibility token. People were not instantly disposed to think I was going to take the place and wash it down the river somewhere.”

The second major problem was financial. Robert Nelson, a fund raising consultant out of the Chicago area provided guidance. He directed them to come up with a “credible financial strategy and . . . you have to go out and sell it to somebody that has credibility in terms of the rest of the philanthropic community.” They determined and devised a “no-nonsense” financial plan and ran it by the Board of the Gebbie Foundation in nearby Jamestown, many of whose directors had close personal or historical ties with the Institution.⁶⁸

Early in Miller’s legal career, he’d spent a great deal of time writing loan agreements between banks and corporations. These agreements have all kinds of restrictive covenants that

govern the actions of the corporation. Miller designed a financial concept that would be binding on the Institution, spelling out what they could and could not do. “That included getting all the debt off our balance sheet within a five year period; operating without a deficit after the first year of the operation; and building a working capital balance of around \$600,000.”

The objective was to clear the Institution of old debt, get themselves on a firm financial year-to-year operating basis, and “to get a little bit of meat on our bones so that we could get through the winter without us borrowing.” One of the plan’s fundamental considerations was that the Institution would not borrow money without the express consent of the Gebbie Foundation. Gebbie responded to the plan by approving the distribution request for a \$1 million dollar grant with the stipulation that the Institution raise \$3 million over the next three years as a match. All of the grant and matching proceeds had to be used to eliminate debt, build the capital fund, and operate without a deficit.

Gebbie set up a monitoring committee that met frequently with Miller and staff to verify that everything was on track. “I would say that if the real history of that particular grant were really worked up and developed it would be one of the premier success stories of American philanthropy. Out of that one specific thing, this place exists as it does today.”

The grant along with the campaign for the matching funds brought the Institution out of its immediate financial difficulties. It provided a chance for the Board and administration to convince the Chautauqua constituency that there was an opportunity to change the future by charting a new course for the Institution now. “It gave us an opportunity to completely revitalize our Board. To develop a Board that had much more of a forward looking, long-term kind of orientation.” They began to build a professional staff. The Gebbie success led them to other philanthropic resources within Chautauqua County who became convinced that a revitalized

Chautauqua would be good for the county as well, and loyal and far sighted Chautauquans came up with the funds to make the efforts a success.

The first radical physical changes also began during the early 1970s. The first condominium was proposed to the chagrin of many traditional Chautauquans. This initial change and others to follow “woke the constituency to the fact that there really was a need to do something here.” There were no places to which younger families would come. The older rooming house types of facilities were no longer suitable to prevailing expectations and the recognition that newer facilities were needed came before the Board and administration. The Boyle Family built one of the first four-unit condos flanking Bestor Plaza. It was designed to fit into the architectural environment and people saw condos, and new development in general, could be done correctly. Other types of projects began to develop. There began a substantial building of more contemporary housing on the north end of the grounds.

These projects, in tandem with the Gebbie Challenge Campaign, demonstrated that the Institution was seriously engaged in reinvesting in itself, thus beginning a revitalization of the entire Institution and private property as well. “Anything that happened was almost instantly noticeable.” One project begat another and gardens sprang up, buildings were upgraded and modernized, and the morale of the entire place changed over seven to eight years.

Remick moved on to a new position in the SUNY administration as things were rebuilt. Robert Hess, who was president of a college in Buffalo, was recruited to take his place. More administratively-based than Remick’s imaginatively-based leadership, he did two significant things. He built the long-term year-round staff into a solid professional group. He made the Institution an attractive employer for career minded people who could think of it as a place for

long-term jobs and career development. The operation of the administration became much more efficient.

Second, he took on the symphony orchestra. [It was clear] “that we were never going to get the symphony orchestra to materially improve its artistic performance until we got more control over their time. Primarily that meant that the administration had to gain greater control over the orchestra.” After some very difficult negotiations, the administration got the control it needed.

Miller stepped down as Board chair shortly after Hesse was elected. He did not want to “climb the same hills” with a new president as he had with Remick. He also saw that the Institution had come out of the financial dark and needed now to talk more about what kind of programmatic future the Institution was going to plot.

From 1972 to the point of the interview, Miller had been the President of the Chautauqua Foundation. In 1972 the Foundation had roughly \$2 million dollars in assets invested in mainly residential mortgages in Pennsylvania. The investment focus of the Foundation was primarily fixed income. He shifted the investment focus to a total return point of view, total return being the actual income productivity (dividend and interest), combined with the appreciation in asset value. He guided the Foundation to engage professional investment managers who focused on companies that had increasing dividend streams and good prospects for asset growth. He also had the Foundation Board change its payment calculation from income only to distribution of a set amount equal to five percent of the book value of its assets at the conclusion of each of its fiscal years. This allowed for a predetermined and steady increased return to the Institution that it could plan on during budgeting. And because the historic return to an equity portfolio is on the order of ten per cent per year, the other five percent contributed to the Foundation’s growth.

The \$8.5 million Second Century Campaign, chaired by Miriam Reading, was the first major campaign for the capital funds needed for the Institution's physical and programmatic revitalization. Half of the campaign was focused on physical projects, primarily the restoration of the Amphitheater; the other half was oriented toward endowments to build the lectureships, artistic and religious programs. The campaign raised between \$3.5 and \$4 million for the Foundation giving it a major boost. Since then the Foundation has steadily grown.

Another significant part of this overall success was the hiring of a full time development director and the building of a professional development office staff. Under Remick, the development director Dennis Vass followed by Robert Alexander headed the Chautauqua Fund's annual drive in the years that coincided with the Gebbie Challenge and the Second Century campaign. Phil Brunskill followed Alexander and then Tom Becker, who was the Director during this study, was hired in 1986.

Miller's objective for the Foundation has been to "get in place a really solid first class development function. Now, if you think about Chautauqua, there's only three places that it's going to get its money from: it's going to sell off its assets; it's going to raise its gate prices; or its going to raise money philanthropically. Sell off your assets, your shooting yourself in the foot. You can't do that and operate. You raise your gate ticket and you price out your constituent's capability to be here, particularly the types of people you most need to have in a place like this to keep its vitality. I think we're already over gentrified. A part of that we can't control. So the third element then is we have to have a development function that really is superior." Hiring a consulting firm, for him was not an option. Miller wanted the operations in-house.

The Institution's budgeting process became a problem because funds to build a development office had to compete head-to-head with funds for programming. Also, a shared agenda left insufficient time to deal with the demands of an aggressive fundraising agenda. Miller and Becker felt the solution to those problems was to turn the entire process of fund raising over to the Foundation. A series of agreements were negotiated and set in place to make sure that this new arrangement would preserve congeniality between the Foundation, the Institution Board, and the Administration. Clear lines of communication between the Presidents of the Institution and Foundation and the Institution Chair were maintained. A Development Council was established composed half of Trustees and half of Foundation Trustees, but chaired by a member of the Board of Trustees, to act as an interface for resolving problems between the two organizations. "So the trustees ended up with a tension [resolving] vehicle that was outside the Board room, but was controlled by the Board because they had the chair." They also stipulated that Chautauqua Fund which raised the money for annual operations would be chaired by a trustee.

This arrangement allowed the Foundation, working from its much larger financial base, to expand its operations and its staff. It also allowed development of a Board that was seriously dedicated to fundraising without the time restrictions of the Institution's more complex agenda. They added David Williams the planned giving officer.

Tom Becker had developed a long-range plan that envisioned being in a major campaign six out of every ten years. This led to the realization of the need for a thorough forward looking planning process. It gave the Institution's Board and administration the mechanism through which to tell the development wing what to raise money for. "It's not the Foundation's responsibility or prerogative to just go out and raise money. We have to go out and raise money

for the objectives and the priorities that have been set by the Board of trustees.” That makes the planning process a priority for the trustees and fund raising the focus for the Foundation. The process followed bringing a set of projects and programs to the table that the Trustees deemed required funding; the Foundation determined how much money might be raised for those priorities; and finally a detailed Foundation development plan was designed on how that might be accomplished.

In the twenty years between 1973 and 1993 the Institution has evolved into a completely different organization, the Foundation had come of age and now is in full partnership with a well understood, well-conceived roll in the over-all enterprise of development.

Endowments are an excellent form of reliable funds. They can be used for planning budgets years in advance. Miller used the example of endowing a chaplainry. The endowment pays for the direct cost of the presenter: fee, transportation costs for the chaplain and significant other costs including hospitality. If there is \$3,000 for that particular week and the chaplain comes from Pittsburgh, there are virtually zero transportation costs which are generally a big piece of any presentation at the Institution. If the total spent is \$2,000 the Foundation keeps \$1,000 and there is \$4,000 for next year’s slot. This means they can bring someone in with greater costs associated with them the next time. The process allows for planning flexibility that wouldn’t be there with an annual operating budget that does not carry left-over money from year to year.

In 1986-87 the Foundation went to the trustees and asked them to plan for what they needed to endow. “Otherwise we’re just out there with our tin cups saying: Wouldn’t it be awfully nice if you gave us \$50,000 to endow a lectureship in a loved one’s name.” The Foundation and the trustees didn’t know what a lectureship cost. There was at that time no long

term strategic plan. But it was clear that the performing arts seemed under-endowed so by consensus the first major endowment campaign for the performing arts was begun called the “Overture for the Future.” From 1987 to 1989 the \$5 million campaign was successfully conducted to build the endowment while the trustees constructed a more comprehensive strategic plan for other endowment and capital needs.

What was clear after the “Overture” campaign was that a great many people were just as happy to give to unrestricted endowments as they were to endow a specific thing. “The attraction is not just the symphony program, not just the lecture program, not just the religion program, not just the opera; it’s everything that happens here. It’s the whole ambiance of the place.” Giving to an unrestricted endowment means the capital will never be spent, but the income can go into the Institution’s general budget to be moved around to wherever it is needed. Around a third of the funds from the “Overture” campaign came in as unrestricted money.

“Where we are now [1993], in contrast to where we were. . . . We have complete full time staff all of whom are in career jobs, doing things at this place that from their point of view clearly fit inside their own personal longer term career objectives. We have an Institution that is now operating at a budget around \$10-12 million. . . . You have a rather fully developed development concept here, which interestingly enough is farther along [in contrast to other organizations] than we thought we were. . . . We have an institution program that is far, far richer than it was 20 years ago. . . . We have a much broader lecture program than we did 20 years ago. The lectures are more integrated and of more national and international character. The physical plant has been vastly restored from where it was and is functionally better. The administration is now thinking well ahead of the curve, ten years in advance. Our credibility in the philanthropic area is now quite high. The Institution is now economically and culturally firmly reestablished

in the Western New York area. The Institution does not rely in any significant way on any government funding, and what it does get comes from the NEH and the NEA [and] acts as a “good Housekeeping Seal of Approval.”

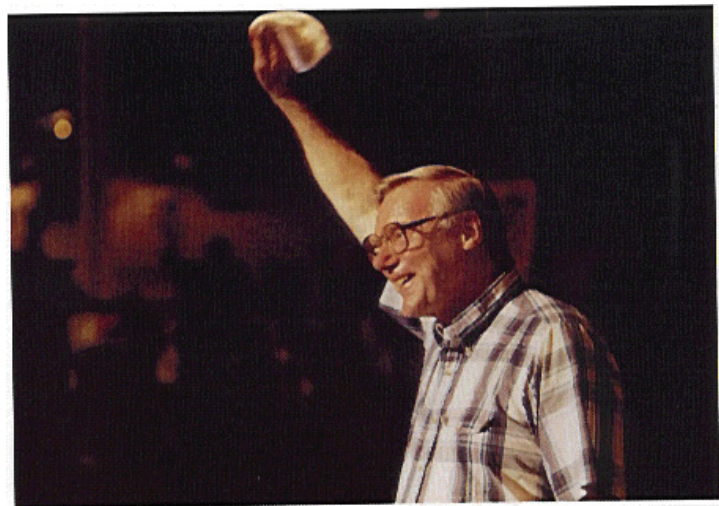
The negative side is that the property values have gone ‘sky high’. It makes entry into the community very difficult. “It has a natural tendency to lead to what I would characterize as over gentrification of the place. I think we need to continue to find ways to bring into our mix a substantial presence basis, not just weekends, but one week or longer . . . the school teachers, the educators, the ministers, the social workers. We value the delivery parts of our society. Because this place is so fully dependent on the exploration of values and the challenging of values, it tends to really integrate values into our whole social and intellectual cultural system. That’s why I think its religious focus is so terribly important to its overall programmatic theme and orientation, because it does give it that kind of a central touchstone around which the program -- whether we say it as overtly as we ought to, or even recognize it as overtly as we ought to -- is inevitably built. Those value focused people are the kind of people we want to attract into our leadership roles. Those are the kinds of people that we want to attract into residence for the long term.”

Chautauqua is a very ethnically white place. As noted in earlier chapters, there is a small representation of minorities on the streets, but overall their numbers are minute compared to the white majority. Miller is delicate here: “We are not appropriately reflective of the socioeconomic mix in society of our racial heritage assets. It is definitely a [pause] at least a WASP, maybe not WASP but WASP community anyway. There are still Jewish tensions. I think that that’s largely generational and dying out quite quickly. There are now Jewish people on the Board of Trustees. There are Jewish people on the Foundation Board. They are very

active in lots of roles around the community. I don't think that's any longer a social problem. But, definitely the minorities: Black, Asian, Hispanic, are very rare. And I guess my own view of that is we're not going to be able to socially engineer that. I think that we're going to have to be assiduous in terms of exposing ourselves where those kinds of people are: in church groups, in educational structure, in various kinds of professional associations, and logical places where people that we would like to be able to attract already find themselves comfortable. And we have to be sufficiently patient to wait for that to happen naturally. I think we have to be more encouraging. . . . It's something we haven't successfully thought enough about as far as our marketing strategy."

While there has been tremendous change over the 20 years since Miller began to rebuild, he still found certain problems at the administrative level. "We're not adequately computerized, our gate systems are archaic." A new registration and tracking system would serve Chautauquans and the Institution much better in terms of logistics and admittance to events. A personalized ID card would store all the necessary information on the individual.⁶⁹

The Institution's form of financial analysis was also a topic of concern. Estimating specific costs for different parts of the program was an issue. If the Foundation wanted to go



Old First Night, 1996

Figure 5.1 Richard Miller 1996

out and solicit funds for a lectureship, they still do not know how much the lectureship actually costs. It is not just the cost of speaking fee and travel costs, there is the set up time for the crew

in the amphitheater, hospitality costs, the cost of administrative staff, “etc., etc., etc.” “So we’re still fairly primitive in terms of really understanding what it is we need to cover if we are going to endow certain kinds of costs.” This applies as well to applying costs for endowing physical structures. None of the problems are threatening to the viability of the Institution, its program integrity, or the constituency’s sense of progress or morale. Estimating real costs and adding efficiencies are important internally for the functioning of the administrative part of the organization.

The change in housing stock and the addition of many condominiums has attracted many young families. There is now a significant presence on the grounds of people in their late thirties early forties who are still actively involved in the professional careers and parenting. “One of the things that this place does superbly, with the right kind of environment in which to do it, is it moves very easily across generational lines, across geographical lines, across socioeconomic lines.” Networks of friends and families meet at the same time during the season every summer. For families that are highly mobile, this is the one place they always come back to. “It is *the* most central *thing* in their lives. It’s their roots.”

“With the building of Lenna Hall [the 500 seat performance hall] it’s now quite clear, or ought to be quite clear to everybody, that we are once again in the area of opportunity rather than emergency, and creativity rather than crisis. And I think it has taken a long time for us to recognize that we have made that change.”

“I don’t think you could seriously engage a Chautauquan today in a ‘do you think Chautauqua will be here next year?’ conversation; which you could very easily have engaged them in 20 years ago.”

The following two chapters will bring together the various stories and voices of Chautauquans to describe the philanthropic discourse at the Institution. Richard Miller's story sets the background for the stories that follow. Chautauquans know that Miller was central to the transformation of the Institution, but many do not know the details of his work. Their stories come about because of Miller and his associates and the work they did early in the game. His story is a core narrative from which the other stories are spun.

Chapter 6

The Confluence of Ideologies

Opening:

The preceding chapters provide descriptions of the social, historical and bureaucratic contexts of philanthropy at Chautauqua. With these narratives in place I now proceed to connect the ethnographic material to the theoretical design that provides the undergirding for this work. This project addresses the concerns of Laura Nader, Christopher Jenks, and Noam Chomsky outlined in the first chapter on studying elites (Nader 1972), taking seriously the intellectual's obligation to address inequities especially in the arena of education and related questions of wealth and power (Chomsky 1967:1; 1986:276-286), and provides ethnographic evidence of the actions of philanthropic donors (Jencks 1987:321-339). Nestling into the heteroglossia, the multi-voiced, polyphonic environment that is Chautauqua; I begin (perhaps paradoxically but I hope usefully) by presenting examples of the various coalescing narratives characteristic of institutional discourses that shape conversations about philanthropy at Chautauqua. This *unitary language* gives expression to centripetal forces that constitute ideologically saturated philanthropic discourse at Chautauqua AND supports the heterogeneous forms in which individual Chautauquans come to understand their place in the philanthropic process (Bakhtin 1984:271).

These unifying narratives represent locally authentic expressions, culturally informed and evident within the heteroglossic conversations that are otherwise accented by categories that permit expression of variation among Chautauquan residents: place, program, family, community, openness, uniqueness, resource, legacy, history, stewardship, responsibility, spiritual and philosophical values, and philanthropy and its benefits. And so on. Bakhtin would define

these categories themselves as *unifying resources*; the generative components of the socio-ideological languages or *speech genres* of particular social groups be they professional, scientific, technical, period based, street based, of specific organizations or generations or in this case *Chautauquan* (1984:272; 1986:60). Formally, Bakhtin sees speech genres as composed of three elements: thematic content, linguistic style “that is the selection of lexical, phraseological and grammatical resources of the language”, and their compositional nature (1986:60).

All three of these aspects—thematic content, style, and compositional structure—are inseparably linked to the *whole* of the utterance and are equally determined by the specific nature of the particular sphere of communication. Each separate utterance is individual, of course, but each sphere in which language is used develops its own *relatively stable types* of these utterances. These we may call *speech genres*. [emphasis in original 1986:60]

The “sphere of communication” writ large at the confluence of reciprocity, place and ideological exchange between Chautauquans and the Institution structures and stylizes the ideology of philanthropic activity. I am taking intentional liberties here by including conversations, written and video media, websites, and just about everything that communicates within this “sphere of communication” and the Chautauquan speech genre therein, something Bakhtin also recognizes (Bakhtin 1986:60, 69). For instance the simple bookmark at the right is part of the Chautauquan speech genre. It may generate just the right emotion at just the right time for a donor to give, or be the reason one does not give because they see it as “another example” of how the Development Office wastes precious dollars needlessly. It communicates



Fig 6-1 Bookmark

and it falls within the parameters I define and develop as the Chautauquan speech genre in this larger more encompassing definition of “speech.”

The unifying discursive components of the speech genre feed the mechanism that allows/promotes an external discourse to become internally persuasive (Bakhtin 1981:272, 282). The shared anchors allow the provision of sufficient personally meaningful content so that an utterance shifts between the Institution’s ideology into the ontology of the donor and vice versa. The Chautauquan speech genre *houses* this heterogenic discursive environment. Speech genres as Bakhtin describes them come in primary (simple) and secondary (complex) forms. The primary forms are base level communication statements such as “How are you doing?” or “What time is it?” Secondary speech genres “Arise in more complex and comparatively highly developed and organized cultural communication . . . that is scientific, sociopolitical, and so on” (Bakhtin 1986:61-62). The secondary forms of speech genres “absorb and digest various primary (simple) genres that have taken form in unmediated speech communication. These primary genres are altered and assume a special character when they enter into complex ones” (Bakhtin 1986:61-62). For instance, “How are you doing?” during the secondary form of a philanthropical ask may be nuanced as a query about personal finances making it a complex question rather than a simple greeting. Such ideological shaping is detected, imbued with meaning, digested, and transferred with the utterances exchanged in secondary speech genres (Bakhtin 1986:62). Chautauqua philanthropic discourse operates for the most part at the level of a secondary speech genre.

It is through this genre laden discourse at Chautauqua that socially dialogic relationships find expression and the philanthropic process takes place. The discourse is shaped by thematic content, style, and compositional structure. I outline and briefly define the themes I found

prevalent below, each expression of the themes is stylized in institutional form and by the individual according to their person and unique countenance. The compositional structure expressed broadly is influenced by the contextual framework within which themes are shaped and developed by individuals. Compositional structure includes the dynamics of dialogism in Chautauquan discourses; the potential mix of text, visual imagery, embodied responses; the integration of history with the present, of individuals with the Institution; and a repetition of basic themes in a familiar style. And yet the way this genre develops will vary from the scripted exchange of protocol in a formal meeting within a lecture hall to less formal rehashing of an event outside the public hall to discussions on residential porches. For instance when an Institutional administrator delivers a speech at the Amphitheater; the formality of the podium and seating, the prominence of the speaker as the focus of attention, the speech delivered in an official if not ceremonial manner, and the language finely tuned to make deliberate and concise points and deliver a specific message; are all structural components of the discourse in action. All parts of the framework on which the communication hangs as linguistic anthropologists have long acknowledged. In a post-lecture conversation among friends, the structure might be a setting in the park behind the Amphitheater where they informally discuss the talk, include personally stylized banter about their position on the quality of the talk or the speaker and their ideas on the topic he or she addressed. The loose and informal emplacement provides for a kind of communication within the themes of community, program, openness and place that transcends what would be formally raised as a question in the event itself. And in one's private residence the discussion of the recent event may take on even more nuanced and personal character.

Wherever discourse takes place it will reflect Chautauquan thematic anchors, the unitary style that constitutes the genre, and a compositional structure that centers the Institution and yet

thrives in dialogism. The Institution has its marker elements that define it and individuals bring their distinct points of view to the interaction representing the Chautauquans elements. How the discourse utilizes and deviates from the genre is nuanced by the individual shaping of these elements in personalized expressions reflecting distinct variations and fresh expressions.

What follows in this chapter strives to capture the ideological intermixing of Chautauquans and the Institution with examples of the types of discourse exchanged there in both consensual and conflicting points of view. But first, I draw attention to the centripetal and unifying discursive elements that shape this dialogue.

As stories eventually started to recycle in the interview process, repeating the same ideas, I knew the fieldwork was transforming from data collection to verification. While they all had a personal slant, the themes surfacing reiterated basic interrelated categories. The boundaries among them are porous and Chautauquans tended to merge these categories together reinforcing each other. These have been covered in some detail in previous chapters but as thematic pillars of the Chautauquan discourse, I summarize them here:

- **Place**: The Chautauqua grounds are composed of historically rich architectural homes and buildings in a pedestrian environment full of neighborhoods, venues, parks and toponymic places (Basso 1996:75). Surrounded by a fence, the grounds are safe, secure, and said to be permeated with the spiritual qualities of a sacred site. People associated with Chautauqua; inculcate this ideology into themselves and their families transporting it with them as “The Place that Never Leaves You.”
- **Program**: At the time of this study the Chautauqua program consisted of over 1,100 classes, performances, and events, covering the arts, literature, religion and recreation. Stressing life-long learning and appreciation of art and culture, the program is the backbone of the Chautauqua Experience.
- **Family**: is an iconic component at Chautauqua. While a steady number of Chautauquans are new, many pride themselves in being part of generations of family attending the Institution, some back to the founding in 1874. Along with place, Chautauqua is a focal point for families to come together annually, especially when many families are dispersed across the country. The safety of

children and as a place where many meet spouses, Chautauqua is a family based institution. Many families maintain a home at Chautauqua and it is not uncommon for these homes to be of high value.

- **Community**: It is a place of handshakes and eye contact. Chautauqua is known for its congeniality, pedestrian lifestyle and as a living representation of utopian social ideals. Front porch conversations on shared performances and lectures, especially the daily 10:45 lecture in the Amphitheater, and familiar faces and surroundings from year to year contribute to the prevailing sense of community at Chautauqua. Safety here is a commodity.
- **Openness**: Among Chautauquans there is a propensity for dialogue, sharing and conversation. This openness of exchange marks an important component of the program where there is openness to new ideas. The grounds are conducive to friendlier and more substantive exchanges than those of an average resort or social setting. People talk to each other with less apprehension within the protection of the place that through its own self-filtering process creates a homogeneous population of people like-minded with regard to some basic principles. This openness also applies to conduct, Chautauquans aim to create a peaceful environment and exhibit ownership by criticizing staff perceived to transgress basic rules such as sliding through a stop sign in an Institution golf cart, upbraid kids who race their bikes in the wrong spots, or dress down drivers who speed on the premises.
- **Uniqueness**: Chautauqua capitalizes on being a one of kind place in American culture. The grounds, the program, and the ability to live in the community make it different from any other resort or cultural destination. Chautauqua provides a place for family, culture, learning and the like and there is no other place like it. Chautauquans value this unusual quality and incorporate it into their own perspectives of themselves.
- **Resource**: Marketed as a place of life-long learning and socially pertinent discourse, Chautauqua is considered a place of educational, social and artistic stimulation. Ideally, as social issues are attended to, discussed and cultivated, Chautauquans are charged to use this information to make informed and socially responsible decisions and to employ what they have learned in the arts, religion, politics or science to enrich their “outside” lives and the lives of others.
- **Legacy**: Especially in a philanthropic context, legacy is a powerful means for Chautauquan’s to leave their mark on the Institution. Many of Chautauqua’s key participants are seniors enmeshed in its governance, philanthropy and programmatic planning. Creating a scholarship for students practicing a particular art or for a lectureship in a particular arena; bequeathing funds to the unrestricted Eleanor B. Daugherty Society; or underwriting construction of a facility, a park, an Amphitheater bench or renovation to a religious building are all examples of how a Chautauquan can leave a permanent mark on the Institution in their or their family’s name.
- **History**: Founded in 1874; the destination to greats like Ulysses S. Grant, FDR, Emilia Earhart, Margaret Mead, Al Gore and a multitude of others; a direct descendent of the great utopian experiments of the 19th century; a conduit to the rising middle class and the broadening of educational access across the country

and an architecturally manicured embodiment of the Victorian era: Chautauqua empirically and symbolically capitalizes on its multifaceted historical roots.

- **Stewardship**: is providing personal direction and expertise to the Institution through boards, committees, task forces and most poignantly through philanthropic gifts. The stewardship is personal as one oversees something appreciated and cherished. Much professional expertise is contributed by retired executives and business owners.
- **Responsibility**: An extension of stewardship, responsibility is a firmer belief that sound guidance is required to maintain the Institution and that as a philanthropic donor to the Institution, it is one's responsibility to use a prudent, if not sacrificial, amount of one's resources to ensure Chautauqua is well cared for and well-funded thus providing for stability and growth.
- **Spiritual and Philosophical Values**: represent the underlying and often understated fourth dimension of the Chautauqua experience formally conducted by the Department of Religion and represented in its many denominational houses. Chautauquans speak of a spiritual resonance that inside the grounds offers peace, solace and transcendent qualities. This Brigadoon effect or the warm blanket feeling along with practicing of one's faith ideally establishes a stable appreciation of sacred traditions.
- **Philanthropy and its Benefits**: Through creating a reciprocal relationship with the Institution giving makes the donor a better person; provides a deeper integration with Chautauqua and other donors; and provides an insider's status of being a true Chautauquan.

This is a list of themes that anchor the institutional and social discourses at Chautauqua and of course there are variations on the themes and perhaps other themes not addressed. But this list is the core set of themes that makes Chautauqua Chautauqua. Family can include socialization, safe kids, kinship across generations and historical roots in and outside of the Institution. Community can represent a group of condominiums, golf teams, or a Chautauqua neighborhood. This is a list of predominant ideas that are porous and feed each other across very fuzzy boundaries. And this blurring of possibilities undergirds the heteroglossia that ultimately constitutes Chautauquan discourse.

Nearly everyone I interviewed said that they have an intense, if not passionate relationship with Chautauqua whether or not they agreed with the Institution's administrative actions. The majority had an extensive long-term association with the Institution and gave

financially to Chautauqua in small or large amounts. The intertwining *realization of mutual ideology* is locked in the black box of my informants' minds and actions, but they did articulate how they loved, or came to love the place, and were continuing to know it at deeper levels of intimacy. "Sooner or later what is learned and actively understood will find its response in the subsequent speech or behavior of the listener" (Bakhtin 1986:69). For many, philanthropy is their response. And therein lies the rub, those with whom I worked closely had adopted enough Chautauquan ideology to become Chautauquans as is evidenced in their giving and their giving created increasing opportunities for them to deepen their embeddedness in Chautauqua and to incorporate its ideology.

Developing the key elements of the complex speech genre will help define the elements of the ideological exchange that drives philanthropy at Chautauqua. Using a speech genre necessitates an intimate familiarity with its key phrases, usages and themes, how to appropriately identify and employ utterances to maximize their productivity. This is especially important in economic exchanges like philanthropy where interactions rely on personal as well as communal understandings. Successful philanthropic interactions encourage donors to improve or maintain the social status of self and family, to add to programmatic or material aspects of the Institution, and to join or reinforce the cultural/historical flow of stories, narratives, legacies and symbols that make up Chautauqua's socio-ideological culture. Philanthropy allows to a greater or lesser degree for the conversion of personal ideology to material actualization in the world. As Chautauquans interact within this philanthropic sphere of communication, they are shaped and developed into donors in continuous interaction with the Institution. "This process can be characterized to some degree as the process of *assimilation*—more or less creative—of others' words . . . which we [donors] assimilate, rework, and re-accentuate" (emphasis in original

Bakhtin 1986:89). As the most concrete response of the materialization of their ideology comes in the form of a gift; the analysis of key themes and core utterances of the Chautauquan discourse sheds light on the context in which these gifts come into being.

Procedures

To proceed, I set the stage as follows. First, I present a selection of the *Institution's core stories* through writings, talks and interviews; then I present what I term "*breach*" stories from the Chairman of the Institution Board of Trustees and the Campaign chair. These stories represent the interface between the Institution and Chautauquans and are authored by those who have prominent leadership roles. They are not paid staff, but volunteer their very extensive expertise to the planning, running, and philanthropic growth of the Institution.⁷⁰ I will then in the next chapter proceed to *personal stories* from Chautauquans that contain the various themes listed above and present philanthropy from diverse Chautauquan points of view. I have selected a number of interviews with common ideas that both endorse and support philanthropy and a couple of the rare voices of dissent about Institution's direction with respect to the administration's policies and the changes accompanying the philanthropic process.

This *triangulation* of the Institution, breach, and personal stories bring the philanthropic experience to light. They reflect the multifacetedness and the interrelatedness of domains as Mauss saw: "All of these phenomena are at the same time juridical, economic, religious, and even aesthetic and morphological," (1990:79). They represent the *centripetal* forces that are the centralizing conservative forces serving to unify the verbal-ideological world and the *centrifugal* decentralizing heteroglossic force that allows for individualizing the process: the "tension filled unity of two embattled tendencies in the life of language" (Bakhtin 1981:270-

272). These three types of stories demonstrate the major three points of view at the Institution. “We are taking language . . . insuring a *maximum* of mutual understanding in all spheres of ideological life (Bakhtin 1981:271 emphasis in original). The artificial order I am imposing is a perquisite of writing ethnography. But there is really no other way to tell the story than to break it into parts, realizing that stories, like people and institutions, are many things simultaneously.

This will then lead to the concluding chapter with a synthesis and summary of the *dynamics of philanthropy* to bring together the justifications for the study, the theoretical elements structuring the inquiry and the ethnographic material for a larger understanding of philanthropic giving, and of one thread in understanding wealth and inequity. This will bring my research full circle and contribute fresh perspective to the dynamics of wealth and power as understood in anthropology, to the value of speech genres for studying discourse, and to the processes of ideological exchange in philanthropic studies.

Institutional Literature and Core Stories: Part I

Chautauquans speak Chautauquan; it is the speech genre of the place that contains and communicates the Chautauqua experience. In its complexity it is written as well as spoken; visual as well as textual, media sponsored, web-based and graphic. As it is generated by the Institution and Chautauquans alike, its themes cycle in daily discourse. Beginning with the Institution, I present a number of short statements from the official voice of the campaign literature to delineate core elements of the Institution’s philanthropic discourse. Included are summaries of President Daniel Bratton’s opening remarks to the 1993 season called the “Three Taps of Gavel” speech which is the traditional name of both the opening and closing talks of the summer season. The President, the voice of the Institution, following a long tradition, literally

makes three taps with a gavel on the amphitheater podium to call all Chautauquans to a focal point. In 1993, this talk officially opened the public phase of the Chautauqua Challenge Campaign. I then present then Vice President of Development, Tom Becker's, ideas to reveal the most cohesive and in-depth story of philanthropy at Chautauqua from the Institution's point of view.

To reiterate, the basic themes surrounding philanthropic discourse at Chautauqua are *place, program, family, community, openness, uniqueness, resource, legacy, history, stewardship, responsibility, spiritual and philosophical values, and philanthropy and its benefits*. I highlight these as I proceed. On the Institution's side, its use of the genre in which these categories are embedded is calculated and consistent.

I covered the gloss and quality of the campaign literature in Chapter Four. This creates the style of the genre. Any well run campaign uses literature like this and most are accompanied by a video of prominent members of the organization describing the need for campaign funds. Yet Chautauqua does this exceptionally well as measured by the success of philanthropy in the community. Note the italic font distinguishing the deeply spiritual, material, and interaction dynamic bringing Chautauquans and their institution together contrasted with the fine bold roman font simply announcing the campaign and the season particulars. Below is a copy of the front cover of a fold-out brochure that accompanied the formal campaign booklet. It expands into a suitable for framing picture of an elderly gentleman climbing the back stairs to the Hall of Philosophy carrying a stuffed briefcase, thus accomplishing a steady, but somewhat taxing task. A visual reminder of the work to be done together. Opening to the first page Chautauquan is written in its most concentrated form:

"Chautauqua. Those of us who have spent time here know it as both a *place* and a *way of life*. A *family legacy* passed down. A *tradition* preserved. An unparalleled community

of *faith*. A spa for the mind. A *home for art-in-the-making*. A *sanctuary* for personal renewal. And a *responsibility* in which we all share.” [emphasis mine, Chautauqua Pamphlet, 1993c]

Note the co-articulation of themes in this passage. The style is simple, direct, and straight forward. There is no nonsense in the campaign, this is a duty for a greater good.

A use of dense discourse allows Chautauquans to find themselves in their Institutions’ call.

“Gathered, Each to Give and to Receive”

(Chautauqua Pamphlet 1993c). Unpacking the message ties the reader to the co-articulation of themes. We have the place, the “here” rooted in the person by legacy, tradition, faith, art, renewal and the clincher, “responsibility”. Bakhtin notes that in formal use of the speech genre there is a certain expressive intonation. “These genres, particularly the high and official ones, are compulsory and extremely stable (Bakhtin 1986:79). The language used in the campaign

literature and most all of the promotional literature in print and on the website uses this formal “stable” language.

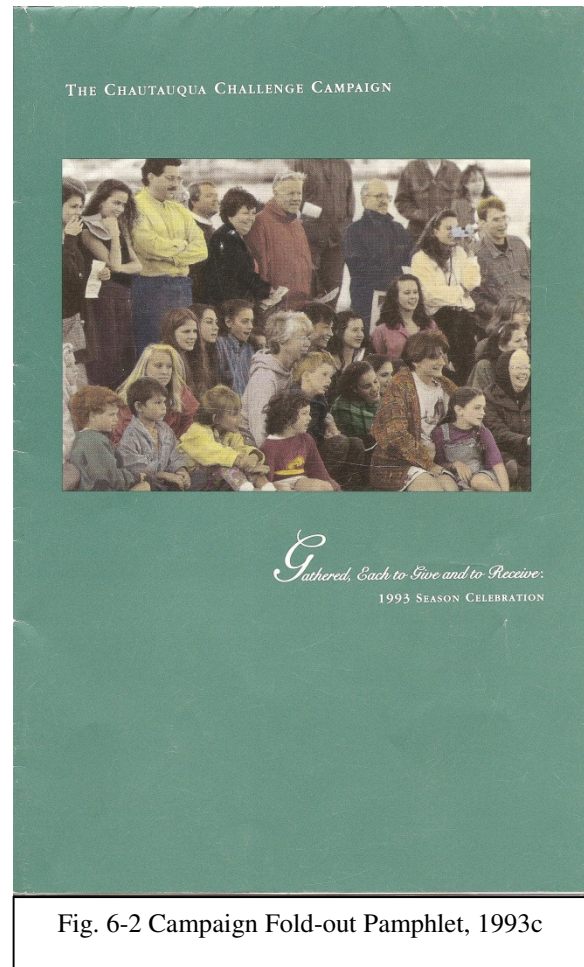


Fig. 6-2 Campaign Fold-out Pamphlet, 1993c

The next paragraph states that the summer will be dedicated to a season of values described in the fold out; each week an accomplishment from the lead gift pre-campaign phase is highlighted. Week One: Massey Organ Concert; Week Two: Library Archive Exhibit; Week

Three: Lenna Hall dedication; Week Four: Orchestra concert for history and “singular contributions” to the community; Week Five: Open House at the Children’s School; Week Six: Old First Night; Week Seven: David McCullough⁷¹ giving the first “Chautauqua Lecture”; Week Eight: contemplation and quiet study; the final Week Nine: “reflecting on our good fortune with a CLCS Roundtable” discussion. Each week and in summary the entire summer season is highlighted by key elements of the Challenge campaign.

This is a demonstration of the kind discerning and attentive administration Chautauquans seek in their institution. The program demonstrates care and efficacy in its design. Three inset



Fig. 6-3 Campaign Fold-out Pamphlet, 1993c

pictures of children playing chess with their fathers looking over their shoulder (mind and family); a small insert of a dance company at practice (art), another of people in Bestor plaza conversing from the wooden benches (community, openness, place). These are visual representations expressing ideological discourse, thematic enough to be compositional elements of the speech genre. They provoke multisensory responses of mind, body and spirit through a

variety of presentation forms: the variations in the actual text, the images that incite emotions and confirmation, and in the feel and texture of the papers used to reflect quality. And this speech writ large brings out the sensual as well as the textual elements of the presentation. These high quality papers, textured images and warm color combinations all add dimension and depth to the brochure and trigger experiences in Chautauquans who respond in the positive. The text goes on to describe the opening of the “unprecedented” Chautauqua Challenge Campaign seeking \$22.5 million dollars to “support the enduring strengths of the Institution” (Chautauqua Pamphlet 1993c).

Throughout this literature there is a constant emphasis on core themes expressed in a style that champions knowledge and openness, simple yet thoughtful elements in word and presentational form reflect modest yet provocative elements of the program and the deeper meaning of Chautauqua, a reach to elegance in italic font expresses deep spirituality and a return to roman font offers the nuts and bolts confidence in a job well done. The compositional framework here brings together mind, body and spirit in visual, textual and reflective elements of the discourse.

Institutional Literature and Core Stories: Part II Three Taps of the Gavel

Bratton’s “Three Taps of the Gavel” talk opened the Chautauqua Challenge Campaign to the public. In just over 800 words he summarized the planning, goals, lead gift campaign, and reiterated history while repeating Chautauqua’s values through the voices of the founding fathers. Bratton used all of the language composing a philanthropic ask. His opening is in fact the Institution’s philanthropic ask with the collective support of the comprehensive thematic grounding behind it. The statement used the key terms, toponyms and symbols that combine the

place with the points of view of the people “to weave them with spoken words into the very foundations of social life” (Bakhtin 1981:293; Basso 1996:75). “Home, beauty, gathering, values, arts, spiritual dimension, legacy, children, tradition, ritual, celebration, life of the mind, quiet reflection; Chautauqua: my Chautauqua, your Chautauqua, our Chautauqua; welcome home to Chautauqua”; are all embracing terms and phrases woven into his speech and used to situate and ground the audience in their warm feelings for Chautauqua as a critical ontological vehicle in their lives (Bratton 1993). Bratton peppers his talk with key terms to distinctly emphasize the how and why behind the campaign: “the Board, the comprehensive ten year plan written in the “Design for the Decade”, strength, confidence, natural environment, restoration, reconstruction, new recital and rehearsal hall, bold set of goals, realistically adopted, strong and vital Chautauqua, I believe the Board took the only appropriate route” (Bratton 1993). He drives home familiar terms from the genre’s lexicon that Chautauquans will recognize and with which they will *assimilate* positively (Bakhtin 1986:89). Themes dot the prose. These are nearly directives reverberating the place of Chautauqua and Chautauquans in service to the larger surrounding world. The stable technical language of the genre reflects sound direction and leadership for the campaign and the Institution that is eliciting a calculated *response* in favor of the Institution (Bakhtin 1986:68).⁷²

Bratton: “What other posture [than philanthropy] can anyone take who knows this place and what it can be, and what it should be, and what it must be?” He describes the campaign challenge itself and then goes on to quote the founders for full historical grounding and authoritative ideological credibility. John Vincent: “this is the Chautauqua idea, a divine idea, a democratic idea, a progressive idea, a millennial idea;” and Lewis Miller: “We are in the midst of great problems and struggles--the right of the people to deal with the commonly accepted

national questions. . . Lovers of humanity must make common cause, must recognize the situation and raise themselves up to the magnitude of the occasion, and carry through to the brightness beyond. Chautauqua must perform her part” (Bratton 1993).

Bratton with commanding reserve reiterates the name, goals and planning strategy of the campaign. “Chautauqua Challenge Campaign--the largest philanthropic campaign in the history of this institution--\$22.5 million to be raised in support of the Design for the Decade and of Chautauqua”. And then he buttresses the statement with news of the exceptional success of the lead gift campaign:

“Our hope was that by this day, I could announce we had achieved half of our goal, or \$11.25 million. Well, we missed it. We underestimated the dedication and belief and faith of Chautauquans. So I can today not only announce publicly the campaign, but that through the response of these good people we have reached not \$11.25 million, but \$14 million in gifts and pledges, sixty-two percent of our goal!” [Bratton 1993]

His closing of: “Welcome home, my friends. Welcome home to exciting and vibrant Chautauqua;” repeats the base ideology at Chautauqua being a spirited community of like-minded people sharing place, ideas and now the all-encompassing responsibility of philanthropic stewardship (Bratton 1993).⁷³ Everyone had been invited in, prepared, forewarned and formally solicited. The gloves were off. The season was filled with support events to prove positive the inevitable success of the campaign’s engine. The message clearly venerates giving as a fruit and obligation of being a Chautauquan and their response was forthcoming.

It is important to note that in a number of interviews people commented on Bratton’s leadership style. His demeanor was stern when walking the grounds. He made little eye contact, had a quick walking pace and just quick acknowledgements to those in greeting. He told me it was a tactic so he could get across the grounds without having to stop and talk every fifteen feet.

Yet it also conveyed efficacy in the business of the Institution, the constancy of work to be done. In person Dan was warm, paternal and intrinsically interesting. My interviews with him were a pleasure and he made me feel like an insider. This was strength and a strategy in his personalization of the Institution. It was how he stylized the genre to his advantage. Donors told me that when he broke character and warmed while talking about Chautauqua, they were defenseless to his appeals. He could bring the Chautauqua experience alive but did so parsimoniously. He was one of the big guns in the structure of the campaign. He told me that for him Chautauqua was the fulfillment of a calling he felt to serve God and people.

During an interview Bratton stated that the philanthropic climate was good and was peaking. He didn't see philanthropy as a single act; it is a process that takes people into deeper levels of commitment. They "become part of the loop—the fabric of the place. Our donors are thanking us for giving them a place where they can give". Ilana Silber states that this is the type of connection that nurtures a relationship between otherwise disconnected social groups creating common ground for Chautauqua donors (Silber 1998:144).

Institutional Literature and Core Stories: Part II Director of Development Tom Becker

Tom Becker, then Vice-President for Development, was described as the intellectual on the staff.⁷⁴ He is a great story teller, administrator and the type of spokesperson for the Institution that inspires confidence and credibility. I met with Tom for interviews on two occasions. He was gracious, yet slightly cautious. He did not know me, but was very helpful in providing campaign materials; the campaign handbook, and the tapes and videos used for solicitation purposes. Tom is an eloquent, cordial individual whose story personalizes the Institution, giving what technically is a service-based nonprofit a face and a voice. The conversational nature of the interview reproduces the Institution's side of the Chautauquan

speech genre as well as working to provide valuable information on how the Institution conducts its philanthropic work. Becker's voice, his style, humor and phraseology powerfully capture the Institution's discursive version of philanthropy. I am certain he employed the genre during asks he made, the training of volunteers and in editing the campaign literature. I have italicized the themes and catch phrases that act as the best examples of this speech.

"In my opinion this campaign is more important than the straightforward objective of raising \$22.5 million dollars. We have such *a comprehensive story to tell in our case about the Institution and where it's going*. About its financial *management*; it's physical *planning*; its sense of *security* about *program* and its sense of insecurity about program, its capacity, its facilities, etc." The training of the seventy-nine volunteers to be advocates of Chautauqua's themes and "deliverers of that tale, is in a sense the creation of a whole *subcommunity of leaders* that has never existed at this place on this scale.

"Many of the people here are people who *own this place*, in the sense that it's part of their *family* and they have very deep, and in many cases very *long term orientations to Chautauqua*. They are not dispassionate about where it's going and where it's been. Like any society, there is a normal amount of confusion and concern about any changes in the status quo. And like any society they tend to not look at the past objectively."

Depending on their ideological orientation, some think that Chautauqua has not changed or is unchanging. The truth is there has been a remarkable amount of change and by definition, philanthropy seeks change and is centrifugal. At Chautauqua, philanthropy has provided the funding to repurchase the past by sustaining the Victorian period in its architecture, the maintenance and cultivation of the grounds, and the concurrent revitalization of private property restored hundreds of period homes and added new structures that via regulations conform to

historic standards. In another light, it has produced a burgeoning program by building endowments for world-class lecturers and performers that the founders would have envied. So in a sense, the more things change on the philanthropic side, the more they stay the same in reproducing the Chautauqua ideal.

Becker speaks from within the Chautauquan speech genre, to articulate that change is a critical component to get across to donors as safe, expected and effective. “It [the Institution] was designed to be an evolving, *changing mechanism*. That’s its real power. But it is equally powerful in the sense that it gives off for those that have been connected to it for a long time, a *sense of stability*. It is a *sense of the familiar*. It’s that sense of *rooting* that provides some people with a sense that they don’t like change; they then mistake that assumption for a sort of unchanging ideal of the program and facilities. That’s just not so. But that’s how it gets *translated emotionally*. I think that what we’ve been trying to do in many ways since I came here is to subtly, or not so subtly, begin to challenge this community to think in terms of *change as a friend*. And as a very familiar partner in the Chautauqua experience. As long as it’s sensible and considered and all of those kinds of things.”

Embracing “change” through the philanthropic discourse makes giving, especially for those not used to giving; compelling enough that doing something new is part of the overall process of maintaining the community and the program in which they are involved.

The meaning of the place as a whole is being negotiated in the philanthropic project; Becker and his team intercede between divergent perceptions of the place and the unitary perceptions and



Fig 6-4. Arthur Bestor,
Chautauqua Inst.
Archives

goals they seek to implement. Acknowledging that their message gets translated emotionally is a powerful step in communications; one that they have to properly manage to stay on the right side of the donors. Saying the right thing, remaining in the genre is a critical balancing act working to ensure that the campaign's message stays on track. Gupta and Ferguson call these "cultural territorializations (like ethnic and national ones) [that] must be understood as complex and contingent results of ongoing and political processes" (1997:4). In this case it is the laying down of an acceptable narrative by community and administrative leaders that make things like change, acceptable, expected and comfortable. Like *Home*.

As we talked Becker discussed the society for annual giving. "The Bestor Society, [those that sign on to give \$1,000 or more every year to the annual fund] is a way of trying to create a mechanism that would exude to the population a sense *that giving to this place is a habit*. You're not going out fresh [to solicit dollars] every year. They consider themselves *members* of the Bestor Society, and while it's an annual contribution, *it's a lifetime kind of commitment and a sense of identity with this place*. When we did that, we specifically came up with Bestor because his presidency was a perfect way for us to illustrate enormous change: physically, programmatically and financially. As a body of work his was an enormous achievement." Arthur Bestor was President from 1915 to 1944.

"It [Bestor's period in office] reflected in a number of people's minds as being the *halcyon days of yesterday*. In our brochure we tracked Bestor's years and world events, but we also tracked Chautauqua's events during that same period. So they could see that this was when the symphony was created. This was the time when Norton Hall [the opera house] was built and the opera was solidified. Theater was passionately argued and debated but installed. *The reach of the place was aggressive*. It was being done in a time when the world was going to hell-in-

hand basket financially. You look back on that presidency; it's marked by *courage, foresight, and vision*." The Institution combines history and leadership by directly inserting this prominent figure into the philanthropic discourse uniting an appreciated past with change and personal action. This is a structural tactic, a compositional structure, an intentional method of storytelling employed by the Institution that keeps history and the present in tandem. As genres are composed of thematic content, style, and compositional structure; constructing utterances about strong central historic and contemporary figures is a structural design element versus a stylistic one within the overall sphere of philanthropic communication (Bakhtin 1986:60). Thus, annual fund donors are encouraged to identify themselves with Bestor and his achievements. He expands outside the parameters of being a mere man to becoming a venerable symbol of stable and reliable philanthropic acts. And stability from a Bakhtinian point of view reflects a formal expression of a speech genre. "These genres, particularly the high and official ones, are compulsory and extremely stable" (Bakhtin 1986: 79).

"Passive communication in the program is not what we're about. Every venue has an exchange as one of its primary elements [question and answer sessions follow every talk and lecture]. The kinds of speakers we have here are not the big names, they are people doing meaningful things and who have meaningful things to say. Some of them are quite challenging or new." Once a person's or an institution's discourse persuades with sufficient force to be internalized, it has gained authority and power, and will create a niche in the overall discourse of a community; and if consistent over time, within the history of the place (Bakhtin 1981: 271, 272, 282).

Ideological and topical material is discussed openly at the end of each presentation but is constrained within the Chautauquan speech genre. Many of the same types of questions are

repeated by regulars to the talks who make for some predictability in these exchanges. Here all three components of the speech genre in action take place: the themes of program, community, resource and openness find expression by working with a compositional structure of the dialogic exchange which becomes the conduit for the expression for individual styles (Bakhtin 1986:60). The dialogue also reflects the exchange component in philanthropic giving. Input at programs is expected and reflects the *open* invitation to become part of the discourse of the Chautauqua/Chautauquan interface. The giving *response* is another way to enter the overall discourse (Bakhtin 1986:68). It is the final compositional act.

I asked him what he felt the reasons were for people giving to Chautauqua. “Almost always people give to Chautauqua *because they really believe in it*. There are variations on that. There have been donors who have given to endowment with restricted funds because they didn’t want the place to change. They buy in to the repetition of something. There have been others who have given as a way of countering the leadership decisions: he wants ‘X’ so I’m going to fund ‘Y’. That stuff is troublesome. I think more and more people are giving this place money because it is either *in their history or if they’re new to it*, they recognize that something *really special is going on here* [uniqueness]. A lot of the donors give to this place *because they’re thoughtful people*. They’re the same people that give to a lot of other causes. The progressive sense of the deterioration of the world is all around us. The same people feel an *increasing sense of responsibility* to things like poverty, and human rights abuses, and urban decay.

“In the last couple of years people have said to me ‘Gee Tom, I’m making this gift, but I gotta tell you that I’m finding myself increasingly troubled by doing this. Am I just giving money to a place that is comfortable when there are all these other needs out there?’

“That says to me even among our internal population, we’ve got to get at this question of what’s this place for? My answer to all of this is that this *place* is a necessary and *unique resource* for people. If all it is an enclave for the “rich”, it’s not a very good enclave for the rich candidly. The point is that it is a place that seeks to serve at every single level of the family from the youngest to the eldest. *To engage them in something. To provoke their minds. To enliven their spirits. To make them a little healthier.*⁷⁵ To send them out of here presumably a little more concerned about issues of poverty, decay, or whatever. They should be more able to sort through all the crap that they’re going to get in terms of information about all that stuff. They should be able to devise some sort of reasonable plan that fits their sense of ethics and moral and civic responsibility and then act on it. My argument is that without this *place* those people are just like anybody else that’s getting the next eight page direct mail campaign from some guy off in Washington who will work for one argument one day and another argument the next day. He’s just looking to manipulate your check book.”

Becker hits on a key number of themes in this paragraph. As *place* it is an enriching *resource* unlike any other that deserves support because of the multiple products (theater, symphony, topical lectures); and it motivates Chautauquans to help the world after learning about specific problems and solutions through the program; and it enriches people spiritually through the aesthetics of the grounds: front porch neighborhoods, handshakes and eye contact that only Chautauqua can provide. It is a donor’s *responsibility to steward* such a resource because of the *philosophical values* it incorporates. It serves the *family*, it serves the individual and in doing so it serves the world. Chautauqua resonates with quality of person, effort, and engagement. The Institution as part of the composition structure pushes these themes into the forefront of the philosophical discourse to make it plain and simple. Support Chautauqua

because it is important to you and helps you make a worthy and well-informed contribution to yourself, fellow Chautauquans and the world.

Keith Basso anchors Becker's point of view: "Because of their inseparable connection to specific localities, place names may be used to summon forth an enormous range of mental and emotional associations – associations of time and space, of history and events, of persons and social activities, of oneself and stages in one's life" (1996:76-77). It's the place, its history, its familial relations, that ethically, morally and civically fit those who frequent Chautauqua. By valuing the condition and the platform along with the influence it has in making people feel better about themselves; Chautauqua is credited with making, with composing in the creative sense, community members that are better people in the world. This is a discursive ploy that resonates with utopian themes that structurally become obligatory to support in their own unique style of giving.

Understanding structure as deliberate design, the Institution practices and promotes the theme of openness as an intentional method welcoming Chautauquans to participate no matter what their beliefs or political inclinations. "Whereas here at least, without a single orientation to ideology [the Development office], we don't care what economics they want to salute, or what theology they want to embrace, or what political system they adhere to. All we want is for them to take in meaningful information and deal with information to challenge them and hopefully go out and act on it." People participate in Chautauqua's heteroglossic, multi-tiered environment with an outcome of creating active, socially dynamic participants where "all kinds of institutions [dimensions] are given expression at one and the same time" (Bakhtin 1981:276; Mauss 1990:3).

Becker continues, "in my opinion, without this *resource*, those kind of world problems that people are concerned about are going to be substantially worse. Because there won't be a

thoughtful response to those things. *I believe that right down to my toes.* Yet, I think that unless you face that and think about that, it isn't obvious. The drum of life goes on and you miss it. It leads to the idea of what are we doing? *People will give for that reason.* Once they look at it, they really say to themselves that "this is important to me". It's important to me collectively as I think about my sense of family. It's important to me as an individual. As I think about the role of this place and what I believe in, what I know, what I care about and then developing all of that [into functional form]". Becker's admission of his beliefs is an example of fusing personal style to communicate the multisensory and multi-themed composition of the Chautauquan ideology.⁷⁶

Becker humanizes the iconic writing of the campaign literature which is the most highly stable and structured example of the genre (Bakhtin 1986:79). He fills in the gap between the poetic glosses of the campaign literature and seasons it with his personal style on the place and its purpose. When donors sit with the likes of Tom Becker, Richard Miller, Dan Bratton and other volunteers who get the story right, the story is cycled (us to them -- them to us) and personalized and stylized (Ostrower 1995:14). The persuasive styles of these individuals are expressed in the structure of the asks which are themselves products of links to "a very complexly organized chain of other utterances" in existence prior to each event (Bakhtin 1986:69).

Meetings with key campaign spokespersons are vital connections that transmit philanthropic points of view and elicit concrete ideological responses (Bakhtin 1981:271, 293). When sitting with Becker, the story moves from an abstraction to a reality. For Chautauquans, it creates an even deeper connection to the place as they experience themselves as the ones living what he's talking about.

Breach Stories

I define breach stories as discourse generated by individuals who serve the Institution in an official capacity but are still volunteers and are not financially compensated. They are not explicitly paid administrative staff, but they play powerful roles in the workings of the Institution. And while they are Chautauquans, they participate at much more involved levels than the average volunteer. These stories came from publications or letters that were part of the campaign literature and address the themes defined above. They represent the median between the Institution's bureaucracy and individual Chautauquans. Heavily invested through their time and influence, they take on an aura of association with the formal processes and internal decision making at the Institution. Chairpersons, noted board members, or visible donors at campaign functions; these individuals represent a *hybrid Chautauquan* being both Chautauquans and people of power within the Institution. As stories per se, they are presented from a personal point of view and transmit the substantial authority and style of the authors. This is their most important attribute and one of their primary reasons for being. In sharing ideology discursively, the receiver has to *believe* what the 'other' is saying. Bakhtin states that for receivers they "sooner or later liberate themselves from the authority of the other's discourse" by making the others ideas their own (Bakhtin 1981:348; 1984:78-92), even to the point where "the listener becomes the speaker" (Bakhtin 1986:68). Highly visible, clearly powerful individuals give the ideological discourse its import; its power to induce that transition. These stories represent how vested individuals, who donate their valuable time to the Institution without recompense, are ushering and anchoring messages out from the inner sanctum of the Institution and into the bright light of the Chautauquan discourse. They are messengers who personify the message they

are conveying. They are embodiments of the type of persons they are attracting, and give credence to those of equal stature. They lead the demure and walk with the elites.

Campaign Letter

The first example is a dual purpose document in that it is composed by one official from the Institution, President Dan Bratton, and two volunteers within the organizational structure of the Institution, Tom Bromeley the Chairman of the Board of Trustees and Robert Osborn, the Campaign Chair. It relies on prominent themes and invests the campaign with their substantial personal credibility providing style. Bromeley played a significant role in the literature and in the solicitation process. Bob Osburn is a lifelong Chautauquan with considerable expertise in marketing, much time on various boards and committees, and was the chair of the Chautauqua Challenge campaign.

Page one of the Chautauqua Challenge Campaign brochure opens with their letter:

Engage in Chautauqua, and you become part of a community where people believe in something. You can feel it in the air from the moment you come through the gate. Ours is a special community which both challenges and comforts, questions and worships. Chautauqua is a place and a program, and it is also an intangible spirit—a collection of many human gifts, shared and spread out among us. [Chautauqua Challenge Campaign Brochure, 1993b:1]

And so on.⁷⁷ Heavily edited, embedded with thematic campaign code words “collection of many human gifts”, “Special *community*”, “feel it in the air” to: “please join us in celebrating the Chautauqua *spirit*, and help us meet the challenge in which we all share”. The letter capitalizes on the themes of program, religiosity or spirituality, and openness. It goes on to integrate history, program, Bestor, the call “to participate generously in the Chautauqua Challenge Campaign . . . to build upon the strengths of the Institution”; and to be all open and inclusive: “Persons of both modest and considerable means have long felt that coming to Chautauqua was

worth hard work and *sacrifice* during the rest of the year. As we invest our best selves to perpetuate the *spirit that is Chautauqua*, so we must extend ourselves financially to meet the Chautauqua Challenge, to *preserve and secure* this one-of-a-kind *resource* for generations to come.” (Chautauqua Challenge Campaign Brochure 1993b:1)

The letter combines the personal charismatic styles and the personal identities of three well known and powerful individuals: Bratton is the key administrator staff but is perceived as being both

president and

Chautauquan; and

Bromeley and

Osburn as

volunteers have



ROBERT B. OSBURN
Campaign Chairman



DANIEL L. BRATTON
President



THOMAS R. BROMELEY
*Chairman
Board of Trustees*

Figure 6-5 Signatures from Chautauqua Challenge Campaign Brochure, 1993b

clear and unambiguous service roles (Chautauqua Challenge Campaign Brochure, 1993b:1). It also uses the speech genres’ compositional structure like Bratton’s Three Taps of Gavel speech in appealing to Chautauquans by citing a significant historical figure from Chautauqua, Mary Francis Cram daughter of former president Arthur Bestor, to bond the present with the past and then returning through dialogism to the final element of compositional structure, the gift, to remind contemporary Chautauquans of their part to sacrifice thereby bringing each individual into the collective effort. Their three signatures running across the bottom unite persons and Institution, bringing the strength and vision, joint effort and leadership demonstrated by these individuals plainly into the discourse for all to see and officially stamp the campaign with their credibility.

Bromeley Letter

The next letter is another example of genre style in use by breach stories. Tom Bromeley in a letter to prospective givers in November of 1993 titled: “The Oil Producer and the Chautauquan”, summarizes his experience as a banker during the oil boom in Bradford, Pennsylvania (Bromeley 1993); again we see a personal identity intermeshed with the institution.⁷⁸ At one point the Bradford area was in one of the most productive oil regions in America.⁷⁹ He writes about three groups of those who prospered: a). those families that developed their oil properties themselves and later sold their fields to major companies investing their money and living off the proceeds; b). the second group that continued to produce on their own and like the first, invested their money and lived off the proceeds; and, c). a third group that without wisely investing their money, spent the profits of their production frivolously without planning or precaution. The first and second group lived “more modestly”, their wealth lasting at minimum one or two generations and for some into the present. The third group, through their irresponsible actions, went broke.

“Interesting folklore about the oil industry, but what has it to do with Chautauqua?” Bromeley then asks his readers to remember Chautauqua 40 years ago (1953); on the brink of bankruptcy, with its deteriorating infrastructure and buildings, with more expenses than income, “it was going down the chute”. Then came the revitalization that led Chautauqua back to its feet, financially sound and with “a comprehensive planning program in place”. With things going well for the Institution, “why bother” giving to another campaign? *Because* if Chautauqua stays where it is and consumes what it has, it will be like the third group of oil producers. It will exhaust its assets and consume its resources and end up broke again. “[We need to] perceive the need, and communicate that need to others, to replace assets that we are consuming, so that the

legacy of the children of our grandchildren will not be an exhausted oil pool . . . but the beautiful and unique experience of Chautauqua” (Bromeley 1993).

In the next and final paragraph Bromeley then makes the pitch for the Chautauqua Challenge Campaign and the Chautauqua Fund:

It is because of your belief in Chautauqua that I am asking you to join the ranks of those who also know the importance of this place and understand the enjoyment and enrichment it has brought to so many. I hope this year you will participate in the history-making Chautauqua Challenge Campaign through your gift to the 1993 Chautauqua Fund. If you haven’t been an annual contributor, now is the time to begin, and if you have contributed in the past, we hope that you will continue your giving in 1993 and perhaps consider an increase. [Bromeley 1993]

What is interesting about the letter is it has a unique feel as a spoken utterance as it contains Bromeley’s personal voice without the heavily edited feel of other campaign literature. While it has nuances of the Chautauqua speech genre, it is clearly written by Bromeley and thus enters his voice into the dialogue. He speaks and writes pragmatically, there are no wasted adjectives or metaphors distorting the message and yet there is the deeper call to duty and to Chautauqua. Bromeley speaks plainly and with force. This uniqueness is a refreshing break from the fluid, creamy language, the “italics” of the Institution’s campaign-speak. Accordingly, I think it is a calculated strategy, to introduce Bromeley’s letter and storytelling into the philanthropic mix as an additional way to demonstrate the authenticity of the Chautauqua campaign and those directing it. It is not contrived, his voice is slightly askew, a stylization of interactions making clear what Bakhtin means by stating that no two people’s ideological domains or points of view can ever be identical (Bakhtin 1986:60). And in fabricating ideology, it is the response of the reader that generates a deeper appreciation stemming from his credibility as board president and the sharing of a personal story intensifies the ask through engaging Bromeley’s integrity.

Conclusion

Now, having set the stage with speech genres as the delivery mechanism for ideology at the Institutional level I will now move onto to how a number of major themes are expressed as residents address their philanthropic life at Chautauqua. I now turn to the voices of Chautauquans and the dynamics of philanthropy itself in the next and final chapter.

Chapter 7

The Conscience of Capital: The Dynamics of Philanthropy

Chautauquan Philanthropy

As I came through the interview process, the themes summarized in the last chapter emerged and began to repeat: place, program, family, community, resource, legacy, history, stewardship, responsibility, spiritual and philosophical values, and philanthropy and its benefits were predominant ideas both being promoted by the Institution and valued by Chautauquans. In Maussian fashion they blend into each other joining to create the fluid ideology of the Institution and Chautauquans joining with the toponymic landscape of the place (Mauss 1990:79; Bakhtin 1981:262-263; Basso 1996:75). The following then will illustrate these themes as described through the various voices of my informants. The themes as assembled below are organic in the sense they began from one interview with a particular Chautauquan who I found especially articulate and who was a very generous donor with both his time and finances. The themes materialized and overlap in the various stories to follow. This textually mimics the unitary resources from which the primary ideology is composed, while giving voice to heteroglossic expressions as my notes and constructions allow.

I will say that the people represented here have somewhat homogeneous levels of involvement and biographical identification with Chautauqua, the heteroglossic voicing of the Chautauquan speech genre may be further diversified if one were to explore the residents and visitors further. Still the group represented below serves to illustrate the housing and diversification of personal relationships with Chautauqua through the speech genre of the Institution. In no premeditated order I will lay out some of the biographical information of those

speaking.

Thematic Descriptions and Personal Discourses

Cast of Characters

The following is my cast of characters. I wanted to briefly introduce those individuals who spoke to one or the other of the themes described above. People have different interests and different perspectives on Chautauqua and their place in it. Some leaned toward the family side of things stressing kinship and home; other were more business oriented and spoke of philanthropy like it was a management strategy. Still others emphasized community and place as their focus at Chautauqua. They are all donors and are active at Chautauqua in one capacity or another. They are old-time Chautauquans for the most part who are invested in the place over time and across generations. The following few pages contain brief biographies of those who I tapped for the core ideas elucidating the themes within the philanthropic genre.

One informant Leonard Madson came in the mid-1920s and has been coming every season since.⁸⁰ He went through the socialization process of schools, job, and returning with his family. His parents owned a house on the grounds. In the mid-seventies he rebuilt a cottage into a year round home. As a retired executive he has a background in marketing major consumer products for international companies made his expertise valuable for Chautauqua. Has been a Class A and Class B Trustee (property owners); sat on the Finance Committee; was a member of the Buildings and Grounds committee when it assessed properties as in need of a major physical overhaul for the planning document the Design for the Decade. He has worked the Second Century Campaign and every campaign since. He and his wife are listed in the \$50,000 to \$100,000 range as donors to the campaign.

Ms. Della Penick, married to Rod Penick, spoke to the number of influences that make Chautauqua pivotal in her life. Her family had bought her home in the early 1930s and had expanded on its size a number of times making room for a growing family. Her grandmother, aunts, uncles, cousins and her immediate family and their guests come at different parts of the summer to visit with them. She called it “non-stop family”. She has numerous other cousins who either come here regularly or own property on the grounds with their families coming in a similar manner. Coming here is “*coming home*”. As much of the family is scattered across the country, Chautauqua has become the core residence in the imaginations of the family living in a mobile culture.

Chautauqua has inspired her to reach out beyond herself. This in turn motivates her to take what she learns here and put it to work back home. There comes a point where personal needs and appreciation for societal needs meet, and she sees where she can exert influence for the good. Chautauqua provides her the motivation to get involved in goodwill projects.

Chautauqua also stimulates communication between people and Della reaches out to others. One cannot be involved in the program here and not think about what its teaching. She and her husband Rod are listed in the \$100,000 to \$250,000 range as donors to the campaign.

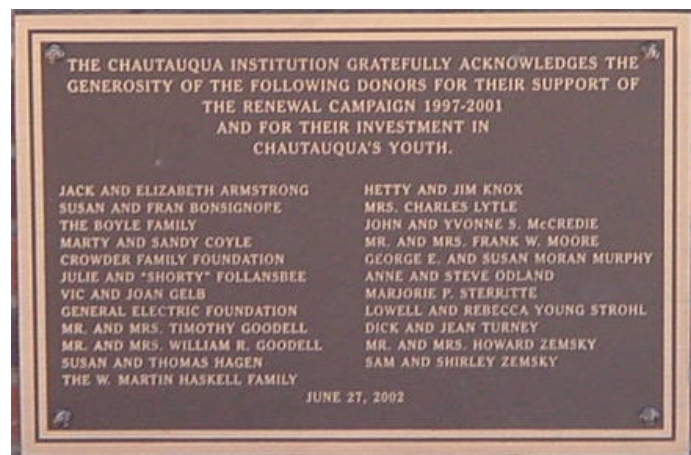


Fig. 7-1 Plaque of benefactors near Youth Clubs. © Benson 2011

Another Chautauquan, Mr. Phillip Royster who had been coming 81 seasons when I interviewed him remembers cofounder John Heyl Vincent speaking (d. 9 May 1920): “Very

happy to remember that historical link with the founding father.” While regularly giving \$5,000 to the annual fund in 1993 and having \$100,000 as a founding member of the Eleanor B. Daugherty Society Pooled Life Income Fund, he goes to VFW and firehouse dinners around the lake and drove his 1963 Rambler from Chicago every summer. He loved Chautauqua primarily because he had advocated adult education all his life. He is listed in the \$50,000 to \$100,000 range as a donor to the campaign.

This next Chautauquan, Martin Brooks is a long time and a very substantial supporter who promoted thinking in terms of the long run: “if someone is giving \$2,000 to the annual fund, starting an endowment of \$35,000 to \$40,000 at six percent return will produce that original \$2,000 in perpetuity. It’s a permanent gift to Chautauqua for as long as Chautauqua lives. It is the continuity of the moral and valuable aspects of the self, in contrast to the market culture surrounding the place. This is an island, a mentality where we are stimulated to be better persons for a greater society.” He and his wife are listed in the \$500,000 to \$1,000,000 range as donors to the campaign.

Allen Flagg, a very successful owner of a national business responded to my questions of why give? “If I don’t give, it won’t be here. My grandchildren own a house here.” His stake for his family’s sake: “to inculcate our children with our value system.” At 50 he had “fire in the belly” (and when he went out on his own and started his business) now at 67 he’s “not tilting at any more windmills”. He is comfortable having chosen Chautauqua as his *philanthropic legacy*. He and his wife are listed in the \$5,000 to \$25,000 range as donors to the campaign.

Rebecca Forde is a lifelong Chautauquan who has been at the forefront of the revitalization of the Institutions. Board member, chair of campaigns and many committees, Forde is one of the pivotal people in the Chautauqua Challenge Campaign as well as the running

of the Institution. As one of the most informative of interviews, Mrs. Forde supplied a number of key elements that led to the formation of the list of key themes for the study. She and her husband donated hundreds of hours of volunteer time to the campaign as well as being in the \$100,000 to \$250,000 category.

John Cavins first came to Chautauqua in 1937, "I've always been here." He noted that things began to constructively change when Richard Miller and Oscar Remick were starting the first major overhauls of the Institution's administration, Board and policies. Cavins was a Cabinet Member in the campaign leading a group of eight volunteers through the solicitation process. His campaign donation was in the \$5,000 - \$20,000 category.

Alan and Clare Tennyson were fixtures of the Chautauqua community at the time of the study. Both heavy volunteers, serving on numerous committees, planning boards, Alan was a Cabinet Chair over a group of solicitors. Livelong Chautauquans their concerns represented those who were being out priced by real-estate costs and gate fees. Commenting on how they saw the revitalization as positive for the Institution, the cost of staying on the grounds was forcing many to either increasingly shorter stays or being forced to sell their family homes. They were not listed as contributors to the campaign.

Doug Pritchard held a number of positions over the year at the Institution including being a Class B Trustee representing property owners, a member of the nominating committee, and chaired the Finance Committee. Pritchard is a conservative pragmatist backing term limits for trustees, solid fiscal policies and sees governance as close oversight of the implementation of the Board of Trustees' decisions and stratagems. A campaign solicitor like the Tennyson's, his concern addresses the increasing cost at Chautauqua; his donation to the campaign was in the under \$5,000 category.

Earl Hightower was one of my earliest interviews. His background included 36 years in industry, retiring from a senior executive position, he had been on the Board of Trustees through some of the more rigorous planning periods in the revitalization process. An author of the “Chautauqua Challenge” (see Chapter 1), his perspective reflected sound planning, testing of ideas, implementation and evaluation. He made a clear distinction between governance and management: governance being the products of policy makes the boards, committees and management who “were making the plans established by the Board work and come into fruition.” The hazard was when those in positions of governance tried to become managers. He and his wife were in the \$5,000 to \$25,000 category.

Kurt Leitch had served co-Chair of the Chautauqua Fund, numerous committees and on the Board of Trustees. As a retired executive from a multi-national energy company, he lent his considerable expertise to planning and implementation. When he first served on the Board of Trustees, he noted the serious “problems in organization”. Working with Richard Miller, he advocated the rebuilding of both the Institution and Foundation Boards and the corresponding work that each began. He served as a solicitor for the Challenge campaign and he and his wife were in the \$50,000 to \$100,000 category.

Lydia Kranz came to Chautauqua in the 1960s. One of the first things she noticed was the Institution “couldn’t take care of money”. The “Miller-Remick Turnaround” was an inspiring thing to watch. She saw that with Richard Miller there was a family/friend familiarity that made the revitalization easier for the older families. “It is easier to take criticism from a friend”. For Kranz, supporting Chautauqua was the hybridization of giving to both a church and college simultaneously. She has served on the Board of Trustees, numerous committees intended to join the Pooled Life Income plan and is in the \$50,000 to \$100,000 category.

Hugh Broderson started coming to Chautauqua on a regular basis in 1976. At that point he noticed that three out of four houses were fixer-uppers; in 1994 there might be five or six houses on the grounds in that condition. Broderson being a bit of dissenter took note of the side of Chautauqua that added color and balance to the hegemonic stories I was told by the majority of Chautauquans. He saw some philanthropy as a way for resentment giving; a Chautauquan donating to Chautauqua as a means of keeping their money from going to a family member with whom they were disenchanted. “Equate this place with a church”, he likened the religious aspect of Chautauqua as wholesome, “giving here is like buying Bibles”. His insights were cultural as well as economic but because of his disagreements with the way Chautauqua was becoming gentrified, he was in the less than \$5,000 category for the Challenge campaign.

Ted Neiman is a fifth generation Chautauquan who has relations who were among the first Chautauquans, one in the Pioneer Class of 1882 of the Chautauqua Literary and Scientific Society (CLSC). His family purchased their home in 1899 which he has maintained since 1971. He related his story through family history, about who stayed with who and when. While in the \$5,000 to \$25,000 category for giving to the Challenge campaign, he expressed his dissatisfaction with how expensive Chautauqua had become, and that religion had been laundered out of the marketing of the place. People were being forced out that had been living the pre-revitalization lifestyle of the Chautauqua ideal.

Thematic Convergences

What follows is a discussion attending to the major themes as they emerged from my interviews with the Chautauquans just described. The themes cross pollinate each other so some stories incorporate more than one theme under a single heading. For instance Rebecca Forde,

Allan Flag, Della Penick, and Leonard Madsen all address family, but I concentrate on Ms. Forde because I found her story the most inclusive. Those Chautauquans who address the same theme but from different perspectives add to the themes' real-world versatility, adaptability and descriptive power. Conversely, the styles and compositional structures revealed in the narratives of these Chautauquans vary. While acknowledging this variation, I am choosing to focus on the centripetal thematic convergences concentrating on the Institution revealed through the generic themes. As a reminder, the central themes are: *place, program, family, community, openness, uniqueness, resource, legacy, history, stewardship, responsibility, spiritual and philosophical values, and philanthropy and its benefits.*

Family. Family and kinship are central elements of the ideological discourse for both long and short term Chautauquans. This is not Cancun or any other place where Dionysian activities are approved and pursued, at least publically.⁸¹ Family might be the most important reason for giving to the Institution. Rebecca Forde: "For me I have been coming here since I was three, and this is really the place now where I am in touch with my parents' lives, my aunts; in a way I'm not anywhere else and so the sense of *continuity* is very large. This is the only place where there are people who knew me as a child who are still living. But seeing through the generations and as I know many many people say, you know the more transitory society is, the more it is important to have this kind of a place. Some of my friends back home are genuinely jealous of the fact that there are people that have this kind of place to go to. So this setting is rare [unique], and I think that once people become very aware of that, that's what becomes valuable in terms of philanthropy." Basso describes how the Western Apache think and act "with" their landscapes, "to weave them with spoken words into the very foundations of social

[and family] life” (Basso 1996:75). Chautauquans do the same thing.

Community and Place. John Cavins has been coming to Chautauqua since 1937. He has served on the Board of Trustees, sat on many committees and has been involved in all of the major fundraising and campaigns on the grounds. His home sits near Bestor Plaza in the historic district, at the time it was one of the remaining homes to not be overhauled and remodeled with all of the modern amenities. The front porch was creaky as were the rockers we sat in.

He warmed in talking about Chautauqua saying that Chautauqua is an “intangible thing -- When I’m at Chautauqua I’m a better person. It’s a holistic place where friendship is elevated, were not just pals here”. His sense of community and place were ontological in that it incorporated a state of being corresponding to the place that generated forms of action. His reflective style included many of the content themes at Chautauqua: stewardship, philosophical values, resource, place and openness. Cavins said that he “gets infected with the place . . . when I see a piece of paper on the street, I pick it up”. He described a quality of emotional intimacy that Chautauqua provides “touches levels below the surface, that out of pure nostalgia there is a warm fuzzy that takes me back to childhood, [the experience puts me] sublimely in touch with every part of life”. As Keith Basso reminds us: “Selfhood and placehood are completely intertwined. Having developed apace together, are positive expressions of each other, opposite sides of the same rare coin, and their power to ‘bind and fasten fast’ is nothing short of enormous” (Basso 1996:146). Touching on the utopian compositional structure of the place John Cavins described he summarized “life here is simple and less diluted”.

Cavins commented on how Chautauqua fueled his sense that community depended on him and it stimulated his generosity to enable Chautauqua to become ever stronger. He found

that part of becoming a “better person” was his heightened awareness that his experience generated “reciprocal” feeling and actions. In being better person, he acted like one. His actions were beneficial toward the Institution in philanthropic gifts and volunteer time. Chautauqua gave to him, so he gave back to Chautauqua.

Cavins saw Chautauqua providing the “part of life that’s formative. I want to support that”. Acts of philanthropy reflect a sincere intimacy between donors and the Institution removing any feeling of being manipulated. “What you fund is almost a voting process”. A donor can choose a specific topic to endow on the lecture platform, or a type of art like dance or theater that reflects their interest or what they deem lacking in the current program. The choices made reflect the “vote” of the donor. “It’s expressing an ideal.”

When Cavins talked about philanthropy his style was personal. He talked about people and their credibility. This is in contrast to other Chautauquans who would talk about philanthropy from an executive’s perspective; dollars, campaign formats, and accounting sheets. He was proud that the Institution’s Development office was “in house; no consultants. Tom Becker is not the rah-rah type; he is the intellectual on the staff and an extremely thankful person. Bratton’s style of leadership is important to Philanthropy here. People trust him to run the place; he has his hands on the wheel with a highly delegative leadership style. He loves this place and people sense it.” Bratton does a lot of behind the scenes fund raising cultivating people at receptions and dinners all year long. Cavins noted the important shift of “not depending on old families,” the trend from the 1940s through the 1960s, and that a new sense of “dynamism within stability” attracted new donors. “Philanthropy can’t handle irresponsibility”. The Board is trusted as along with the leadership giving stability to donors who need confidence in their leaders.

Stewardship and Responsibility. An aspect of philanthropic giving is the way it helps insert and embed the individual into the fabric of the place, to take personal responsibility. Some donors expressed this as a pivotal necessity and that if the endowment ever reached the point where the Institution was completely self-sustaining, it would remove one of the most important reasons for being there: *giving to be relevant and to experience the responsibility to give to sustain the Institution*. If this critical element were removed, the need to be needed, the sense of ownership and stewardship, and being involved philanthropically and through governance would be lost and that essential sense of being integrated with Chautauqua would be damaged and diminished. The basic human need for affection and esteem would not be satisfied by the Chautauqua Experience and obsolete donors would lose a vital part of their reason for coming to the Institution.

A business/family perspective from Rod Penick is an example of how an individual crosses the Institution/individual border. He feels he is actively involved in shaping the course of Chautauqua. He is a relatively “new Chautauquan”, only coming here for 35 years as of 1994 and married into the place. He and his wife are in the \$100,000 to \$250,000 campaign donation category.

A pragmatic individual from a business background, Penick emphasized concrete matters concerning philanthropy. He has led volunteers as a Cabinet member, monitoring their progress and making calls himself. He stressed the need for a solid plan like the Design for the Decade and sixty percent of the total being collected in the “Lead Phase” before the campaign went public. That builds confidence in the campaign; it was already over half way to its goal and that momentum that carries the rest of the campaign along. A powerful point in the discourse. If the

campaign were a chess match, things were getting close to checkmate. The successful lead gift phase of any campaign if well executed provides the overall philanthropic community with the much needed confidence that they are going to make their goal. If a campaign started at zero, it is an all uphill climb. Penick's confidence was contagious as a prominent Chautauquan it resonated out through the community discursively and bolstered the campaign adding credibility to the process.

He saw Chautauqua's development as very good, but was still "getting the kinks out". Recognition, expressing gratitude was very important to the campaign: notes, letters, Bestor Society, plaques, and names in the Chautauqua Daily. He pointed out Chautauqua's constituency was not getting larger; the problem was identifying new people to bring into the fold. The planning was emphasizing growth, but how much growth was the right amount? Penick saw a need to strike a balance between the growth of the Institution and its philanthropic goals. Fiscal responsibility was paramount. Bigger and better should not be the sole reason for raising money: "that dog won't hunt". Responsible long range planning from the Institution board and the Foundation and solid "home brewed" management, if properly demonstrated to Chautauquans, would allow the Foundation "to raise money forever".

What makes people give? "No idea what the key is—it all comes together and hits the right note and it happens. Givers are givers, I give to feel good about it." That right note is the ideological confluence noted above. Givers come back annually and experience positive reinforcement—kids are safe, it is a fear free place to be. People are on their porches all the time. "It's WASPY here, there is no divisive sense to tear things apart". Unadulterated confirmation that the status quo was okay with him. And this went unstated in most interviews but here affirms that Chautauquans like things the way they are even while less emphasized is

the history that acknowledges that the way keeps changing.

Penick emphasized that it costs money to run the place. Philanthropy reinforces and holds the quality of the place together. “If you have a thousand dollars in this place, you obey the rules, you belong to the rules.” Philanthropy creates a sense of *ownership*—“they’re my rules now”—as is the community. “If you made this place free, it would decay” because the sense of ownership and stewardship would disappear. Without it, the spirit holding the place together would be gone with it.

Another type of *stewardship* is the injection of professional level advice and guidance from retired corporate executives. Kurt Leitch, past executive, was a campaign volunteer, a founding member of the Eleanor B. Daugherty Society and along with his wife were donors in the \$50,000-\$100,000 category. He served as the co-chair of the Chautauqua Fund, was on the Board of Trustees, was on the search committee for the president Dan Bratton, chaired a number of committees and was on the Growth Task Force. Leitch gained interest in the historic development at Chautauqua and watched as the organization grew in sophistication; such as Richard Miller’s building the Chautauqua Foundation Board and his attention to the qualifications he pursued for his board members. This built his confidence in the overall structure of the administration and being from the business community as an executive he spoke of Chautauqua in terms of its qualities and administrative strengths. “It’s the ability to act and take action”. For instance safety, he said, “we sell security, and it is a real commodity. A lone woman can walk at 11 o’clock at night and is safe. It’s family stuff in spades.” His concise and decisive discourse leads others to make strategic decisions.

He kept prodding the administration to do more. Installing a Planned Giving officer had been talked about for years but nothing was done, but he kept the pressure on until an officer was

in place. Now that it is in place and is setting up funds that will be in the “pipeline 20 years from now”. The Pooled Life Income Fund started small but is now making progress. “Takes time to work.” He thought that Bratton and his team put together the best possible program with the dollars they have. The Trustees are charged with raising the dollars for them to do it. Keeping the cost of the gate down is important. Philanthropy offsets that cost. Cost of living continues to escalate; the Institution has to keep up. On the campaign, he wondered how much publicity is the right amount, how much is too much. There is need to attract people who can philanthropically help pay for things here. Unrestricted endowment giving is buying into to the place on the whole and shows trust in the Board and Administration. Restricted giving is from those are interested in a particular program or project or to exhibit control. Leitch’s ideas took on the role well represented by a number of Chautauquan to help administrators do more and expand and protect Chautauqua. His discourse was interactive and pragmatic which inspired others to act.

Spiritual and Philosophical Values. Chautauqua was founded by a Methodist minister and an entrepreneur, a pragmatic mix of religion and economics. Echoing John Cavins statement above, the intimacy that takes place between Chautauquans and the place has a compositional structure to it that surpasses the quotidian. In their personal styles people call it the warm blanket of spiritual embrace that envelopes the place with a supernatural quality. Lydia Kranz described Chautauqua as a “hybrid between a church and a college”, a “Camelot” with a lifestyle to be conserved. So being between is a critical element of the spirituality and philosophy of Chautauqua. It’s “Home” in Dan Bratton’s sense of it being an enigmatic place where relationships the spirit and learning flourish. Where people come to live at a level of intimacy

with others and the place that creates in what Cavins called a “better person”. The gate and fence provide a sense of security and safety that people refer to as the “Brigadoon” effect. So it is the fact that Chautauqua exists between the real world and this living condition of well-being and enrichment that provides for this transforming place. Chautauqua is a liminal place providing an escape from the frustrations of the postmodern world and a haven for the nostalgic living of family, learning, artistic expression and intimacy with God. Chautauqua provides a place of rest, renewal and *communitas* and this opens the door for a spiritual pilgrimage and rejuvenation.

Communitas is most evident in “liminality”, a concept I extend for its use in Van Gennep’s *Les Rites de passage* to refer to any condition outside or on the peripheries of everyday life. It is often a sacred condition or can readily become one. . . . The intervening liminal period or phase is thus betwixt and between the categories of ordinary social life. [Victor Turner 1974:47, 53]

I have a favorite symbol of this occupation of the sacred. At the Methodist House, located directly behind the Amphitheater, there is a living tradition of keeping the doors to the church room open wide during the day and evenings while there are performances. Chris Redman an annual visitor who



Fig 7-2. Methodist House Altar. The doors are always open during programs. Benson © 2011.

wrote two books about Chautauqua explained that the reason for this is to remind Chautauquans that no matter what worldly learning they take in or what art or music they enjoy, *God is always present*. The cross on the altar is best viewed at night after coming out from a performance at the Amphitheater. Looking in the doors and down the long corridor between the seats sits upon the

altar the lighted cross. If there was a spiritual center to Chautauqua Institution, that cross is ground zero. In all that Chautauqua offers, at its heart is God's presence. And for Chautauquans, it is a thematic metaphor for who they are, a person filled with knowledge with the sacred at their core.

Legacy. Philanthropy delivers a personal sense of gratification. Some of the giving is easily within the financial resources of the donors, for others it is sacrificial. Most interviewed agreed that there were two main phases of philanthropy in the recent history (40 years previous to 1994) at Chautauqua: a). The "Save Chautauqua" rescue scenario of the 1970's Second Century Campaign when the place was seedy, broke, the amphitheater was falling down and it was sink or swim; and, b). today, the need for dollars to enhance and develop Chautauqua's program, physical plant, endowment, scholarships, and facilities maintenance; are the future-poised needs that Tom Bromeley addressed in his letter. The 21st Century is more relevant to philanthropic concerns compared to the 60s and 70s when the Chautauqua was almost an anachronism and resistant to change. People feel there is a renewed need for a Chautauqua vital and functional for the coming generations. The Chautauqua Challenge campaign was designed to *enhance* current funding streams, to build new endowments and add to others, and to put bequests in the pipeline for the future.

Rebecca Forde: "The realization that Chautauqua is a rare and precious sort of experience is that it makes you appreciative but also increases your sense of



Fig 7-3. Young and Old. Benson
© 2011

responsibility to stay involved. Now I am one of those people who feels strongly that the people who are part of the current experience must also be a part of the responsibility; meaning I would never want Chautauqua to reach the stage where the endowment covers all of the expenses. I think that would be a financial disaster and it would soon disappear.”

I asked why this was so: “Because I think that when people are part of something, they have to feel commitment and responsibility to make that world a better place. And if you look at some of the big churches, where they have a huge endowment, some of the big downtown churches, they have no congregation left. A handful of people are now part of that demographic pattern, but there’s nobody that really has to have that commitment to its future regarding its present undertakings. *And that means losing an enormous amount of vitality in leadership that I would not want to have at Chautauqua.* I think one of the great strengths here is when people become involved and bare a responsibility, whether it’s in the Woman’s Club or my own exposure primarily through the board of trustees and certainly the fund raising effort; *there’s a change that takes place in people* in terms of their..., not that they weren’t or didn’t consider themselves totally committed before, but there’s a *growth that occurs*, and I have seen that happen in almost every instance no matter what the personality, or prior commitment the person had. *And they are really enriched by that experience* and certainly their service to Chautauqua and their commitment to the future is enriched by having had that kind of experience to go with their philanthropy. And it’s a neat thing. And I think it’s very important. *I think it’s the life blood*”.

Forde presents a perfect instance of how the ideologies of Chautauqua and donors knit together here: “I think that everybody who comes here should participate, no matter how small, in the philanthropy and I feel badly that there are some that still don’t understand that. That *it is*

a joint effort and a joint commitment”.

It is the participatory actions of thinking through how much philanthropic involvement is required to create one's legacy at the Institution at a suitable level that provides satisfaction. What goal can be attained where one can say that I have done enough this year or for this campaign and truly mean it and be at rest with the decision? For some it is sacrificial, for others it may be a regular check. Some are going to over-give and tax their resources while others will under-give and feel remorse or at least some scroogian guilt. Arbitrarily there could be imagined a sliding scale or a seismometer of satisfaction where their philanthropic gift meets a sense of obligation and contentment. Once a certain level is reached it corresponds to an ideological imbedding of Chautauquan ideals into the donors cognitive and social lives. Giving becomes a way to publically and personally collaborate with the Institution and to nurture its growth and to sustain a joint ideological purpose in the world. Through the years the embedding process increases in potency and in relevance to the individual, their family and friends and to the greater Chautauquan society. Forde: “The realization that we are just like a chosen people that are fortunate to have this place in all its various meanings given to us as individuals and collectively. We want to pass it on to be vibrant through time. Not as a footnote to history but to live and breathe in its time now and for generations to come. We get to participate in the continuity of history.” While under a legacy heading, the themes bleed into one another. “Chosen people” feeds the themes of uniqueness while mentioning history ties into the historical theme and legacy as well.

A key component of giving at the Institution is the legacy of making a lasting impact. Endowments, bequests for endowments, restricted or unrestricted funds, buildings and their endowment are possible philanthropic interests to fund. Age is also a factor, as Rebecca Forde

put it as she aged, and realized that her time was finite, she wanted to make sure her *legacy* represented her values and those she wanted instilled in her children. It was also an opportunity to pass onto future generations a secured program, lectureship, or facility that would serve long into the future. “I think that as you develop, your own interests are going to become effective, your own concerns and the things you think important begin to grow relative to your economic circumstances. And time is obviously a huge, huge component of that. It is very difficult as you reach middle age you get to thinking about things somewhat differently and as you reach the stage where I am (early 60s 1994); you’re beginning to *think about what you want to leave behind*. There are different sorts of realizations and different kinds of maturity and you’re thinking in terms of estate planning and what you want to do, and what you want your children to be thinking about, and whether you leave an experience like this in what you hope was good shape, so that other people can experience it the way you have”.

The legacy idea is a powerful one as the majority of Chautauquans are retired or at least approaching retirement age. Part of the success of the campaigns relies on promoting leaving a legacy to those who have come through the introspective process. When the majority are thinking “you’re beginning to think about what you want to leave behind”; it is a financial demographic advantage for an Institution rooted in history, kinship, and lineages. It is an intimate decision for those who care deeply about Chautauqua to want to have their name or that of their family or a loved one associated with the programmatic, facility, scholarship or educational facets of the Institution. It is an ideal theme to emphasize in the ask process, especially if the solicitor has already set up a legacy project of their own. The ask would generate dialogue emphasizing the heritage of a donor’s gift and there is the plus that the larger the gift, the larger the legacy.

Openness. Founder John Heyl Vincent called Chautauqua a pandenominational place, open to all religions and an educational place where all forms of literature and science were welcome. Add the arts and recreation and you have a cultural compositional structure based on openness and receptivity. Historically this openness has fluctuated in conjunction with the larger American definition of what was considered open for middle class whites and Chautauqua went from being open to Sunday school types of curriculum, to later opening to opera and theater. As the world expanded so did the lecture platform and people like Margaret Mead and Thurmond Marshall spoke; to the last 30 years of expanding to embrace an expanding though still select religious nexus, major movements in the arts, politics and culture reflecting the globalization of information and interests. Even more recently there is a growing awareness of a need to open to US domestic diversity and expand access and inclusion more broadly.

Openness is a form of embracing the new people. The majority of my informants were old time Chautauquans with historical roots leading back generations. They told me about adjusting to “one-weekers” who were the product of Chautauqua’s shift to visitors who were restricted to only one week of staying on the grounds. But this is a fine working example of how change is embraced by traditional Chautauqua. The Tennyson’s (Alan and Clare) were long time Chautauquans who were campaign volunteers, widely known and well respected throughout the Chautauqua community. They recognized the restrictions imposed by a short stay and went out of their way to welcome new Chautauquans into the fold. Clare worked within the Woman’s Club to welcome newcomers while Alan felt that it was part of his day to “deliver a message about the place” to newcomers. He said that at first “they felt like people that *we* didn’t know existed and now they *feel found*”.

Philanthropically the Tennyson's supplied a different point of view from most of my informants. They wanted to make sure I knew that there were ways for those who had been priced out of the market to attend Chautauqua and many did so. For instance there are scholarships designed to provide small grants to help families pay for their first visit to Chautauqua. Also, there are a number of ways to trade work for a gate pass. If an individual is willing to work at the "loads of little jobs" around the grounds such as ticket taking or working a hospitality counter, the gate pass for that week could be free. Their slant on openness was that Chautauqua could be for everyone and that the Institution was working on ways to make it so.

Earl Hightower a retired CEO of a substantial Pittsburgh manufacturing corporation saw Chautauqua as the "Beacon on the Hill" requiring care and long term attention so that when the world needed a model of a sane society to return to, Chautauqua would be there at the ready. His emphasis on openness was on the ability for the Board of Directors and committee chairs to recognize the vast "talent pool" at Chautauqua and to invite newcomers and young people into the "real action" aspects of running the Institution. "This stuff gets into your blood". He did mention the "cradle to grave" openness at Chautauqua that most people don't consider unless they are embedded in the place. That being the cemetery, where should one choose, they can be buried at the Chautauqua Town cemetery adjacent to the grounds for the fullest participation in the Chautauqua experience possible.

Openness also has a flip side. Doug Prichard reminded me that Chautauqua is not for everyone. Some people come and do not find it a fit. "People leave because they made a mistake in coming". David Carnahan said that there was a natural selection process and "Vegas people don't come here, or don't come back". Neither was reticent, it was just a fact about how Chautauquans became Chautauquans.

A Jewish Story and Expanding Chautauqua's Community. *A Test of Openness:* An important set of stories come from the Jewish population at Chautauqua. They allow for a unique view of how new groups enter a discursive flow and how *openness* functions at the Institution. Chautauqua's heteroglossic environment had been produced and sustained by relatively stable EuroAmerican Protestant ethnic group for the first 90 years. One of the first Jewish homeowners on the grounds, a pioneer really, tells a historically different story about his involvement and philanthropy. While traditional Chautauquans' discourse generates a somewhat repetitive philanthropic story of program, family, history and tradition, and who represented the rising bourgeoisie of the tri-corners of Western New York and Pennsylvania and the Northeastern Ohio; it was by tradition, solely a white, Christian-Protestant place. While African Americans, Catholics and Jews were "officially" welcome as part of the formal openness policy, they were not part of the intergenerational fabric of Chautauqua until the 1960s. This is where the WASPy traditional ethnicity begins to break down and as new people enter Chautauqua, they contribute to and alter the traditional white Protestant discourse.

My informant Marshall Boaz was an attorney and very successful developer who came to Chautauqua in 1961. "How it is here for Jews?" he asked and people said, "It's good. Come!" He did and brought his family. First for one week in 1962, the next year for a month, and then rented a place for the next two full seasons. In 1965, after some atypical delays with the Institution's property approval process which he attributes to his being Jewish, he bought a home. It took an uncomfortably long time for the institutional authorities to make the decision to let Jews own property on the grounds.⁸² And this begins the discursive and cultural assimilation story that the Institution and their Jewish constituents went through. Important to philanthropy

because as Jews gained full citizenship on the grounds, they became a significant pool of benefactors as well.

In illustration, in his 30 plus years at Chautauqua Boaz filled a number of voluntary positions. He was an area representative of the Chautauqua Property Owners Associations (CPOA); was a Class B Trustee representing property owners on the Institution Board; and a Class A Trustee and has served on a number of committees and task forces and as a volunteer serving campaigns. He lent his considerable expertise to writing the Architectural and Land Use Regulations for remodeling, construction and reconstruction projects and he adjudicated appeals. This represents a great deal of work and commitment.

Boaz entered the ‘other’s’ discourse and plowed the road for more Jews and people from other ethnic backgrounds to enter Chautauqua and its ideological discourse. Bakhtin says that the other’s ideas are questioned, teased, objectified and put into new cognitive contexts in order to expose weaknesses, "to get a feel for its boundaries" (Bakhtin 1981:348). This dialogic process; endless, powerful and vigorous; enriched and fueled an ethnic shift at Chautauqua. This was groundbreaking work that took years of reciprocal assimilation on both sides: traditional Chautauquans embracing the new influx of Jews and Jewish Chautauquans diligently acculturating to Chautauqua and Chautauquans and discursively integrating, as much as possible, into the mainstream. It wasn’t easy and as outlined in the description chapter, it was a reticent, tiring and a sometimes turbulent process. Boaz noted that certain Christian groups like Chautauquans for a Christian Focus sponsored programming “that enabled anti-Semitism a certain outlet, to be expressed openly”. At one point indicating a water mark in intolerance, an individual stood up in the Amphitheater and shouted “The Jews are taking over Chautauqua”. He was promptly shepherded out by President Bratton and the ushers. In contrast, the Hurlbut

United Methodist Church on the grounds opened their doors to the Jewish community offering them space for Saturday Sabbath to the point of covering their cross in the sanctuary for the entire summer season. Boaz: “The baggage got heavy, but we wanted it better for our kids.”

Bakhtin points out in the fourth chapter of “The Dialogic Imagination” that:

The importance of struggling with another’s discourse, its influence in the history of an individual’s coming to ideological consciousness is enormous. One’s own discourse and one’s own voice, although born of another or dynamically stimulated by another, will sooner or later begin to liberate themselves from the authority of the other’s discourse. (just as they struggle with each other in surrounding social reality). [Bakhtin 1981:348]

It was rough at times, some blatant discrimination and anti-Semitism, lots of undertow and plenty of semantic negotiating from both sides. “Jews from New York City are identified by their accent and called “212s”. But over time it became easier. These pioneering efforts clearly indicate the complexity and time frame of slowly and patiently making a substantial ethnic cultural transition. But work like his had a domino effect that paved the way for more Jewish individuals and families to come to Chautauqua, to speak Chautauquan and to become increasingly accepted as full citizens. A wealthy Jewish Chautauquan said “When a Jew is on the Board: then I’ll give.” Within a year there was a representative on the Board of Trustees. He became a regular donor and was in the \$50,000 to \$100,000 category at the end of the campaign. Marshall Boaz was in the \$25,000 to \$50,000 giving category for the Challenge campaign.

The ideology of Chautauqua itself had to play a role, even though the Chautauqua Challenge states that the Institution is based on the Christian tradition, its strong leadership and values of acceptance, tolerance and community had to be tested and put to work. But it wasn’t until 2009 that a permanent presence for Jewish studies was established on the grounds much like the other denominational houses, the Everett Center for Jewish Life.⁸³

Catholic House. Another Story

of Openness with a Twist. Roman

Catholics went

through a similar but not identical process. Catholics had not been excluded from Chautauqua and Mass was said on the grounds, sometimes



Fig 7-4. Plaque on Chautauqua House. Benson © 1993

daily when I was doing field work. But they did not have a traditional house like the other denominational houses, in fact the house they were renting at the time was referred to as ‘the slum’. The current Catholic House on the grounds is in a beautifully renovated home behind the Amphitheater next door to the prominent Methodist House. It was refurbished by the Lennas’, who were among other things responsible for the multimillion dollar Lenna Recital Hall and the extensive renovations to the chapel that serves noon Mass daily. The Lennas’ provided/created three powerful discursive streams with their gifts into the overall discourse. Sometimes openness means prying something open, like with a velvet covered crowbar. Their vast wealth commanded authentic respect and their generous gifts altered the ubiquitous Protestant theme of Chautauqua’s Christianity. The twist comes because the very powerful change caused by the Lennas wealth empowered Catholics in this traditionally Protestant haven. Their wealth could not be ignored and it subsumed and forced a new religious point of view into the mix at Chautauqua. The clearest example, especially for a study of language use, of *money talks*. From an ideological point of view adding to the diversity added to the richness of the Chautauqua experience and strengthened the context of openness. By expanding the religious communities on the ground Chautauqua began to take first steps to reflect American demographics. The next

move may be the opening of Chautauqua to a more robust representation of domestic minorities including Native Americans, African Americans and Latino or Hispanic populations.⁸⁴ From a philanthropic point of view, cultivating and promoting diversity while also encouraging a kind of collective cultural assimilation that allowed Chautauqua to change made sound financial sense.

Turbulence and Dissent

Historically and during my time at Chautauqua there was not always consensus on the philanthropic or administrative direction the Institution was taking. The next few Chautauquans gave evaluative critiques of philanthropy at Chautauqua. Hugh Broderson was in the less than \$5,000 category which is a philanthropic discursive statement for a person of some means signifying he wasn't supporting the Institution. He defined a type of "narrow giving" that he criticized, as coming from those who wanted to publically be recognized by entering the legacy discourse and having their names on things. Others receive benefits like lunches with speakers, streets names after them, or a golf cart for getting around the grounds he noted. It is a way to maintain leverage in the social strata, "to get a visible return on an investment".

As I observed, some have less means and give sacrificially while others surprise the administration with larger gifts from people they hadn't expected to hear from. Alfreda Irwin, past Chautauqua historian and archivist (and a tremendous help to this project), said that when she was working at the Institution it was hard to get support for her department let alone face-time at the administrative offices. When she decided to give a substantial gift, she is in the \$100,000 to \$250,000 gift range for the campaign; she was suddenly welcome at the Colonnade (central offices) and started getting regular attention.

Once in 1992 a diamond ring turned up in the collection plate with a note stating the

giver had got caught up in emotion of the place and wanted to give something valuable right then. On the flip side, a Chautauquan was offended by the Institution not painting something within view of his property and withheld a donation. Long term people tend to give more than one week stays. They are more vested in the place and its role in family and the Chautauquan way of being. Others who have means and withheld donations when they didn't get what they wanted have a tendency to be ostracized. The groups he described were related and followed each other's decisions. Some were coldshouldered to the point of having to place an ad in the *Chautauqua Daily* for card players or partners in the scow race. In this case of the ostrification, their discursive volley was returned negatively because their actions were considered paltry. Some people have prominent names, but do not have much wealth.

What these stories represent is a natural and to be expected turbulence in the discursive flow of philanthropic ideology. The response to Mrs. Irwin was an anomaly as she was one of those donors that was right in front of their faces for decades but never perceived as a funding source like many of the other old Chautauqua families of which she was a part. The Institution's face-saving attention to her after her gift was the only course of action they could follow. Hopefully they learned from it. Allen Flagg took things into his own hands and angered other Chautauquans who then opted out of their philanthropic obligations for a while. Hugh Broderson didn't like the favoritism he saw coming with gifts, but when very large sums of money are being donated he conceded, allowances are made to keep the tap open. What is important to note is that sometimes there is *choppiness in the discourse*. It's not always the creamy discourse of the Institutional genre. Ideologies can flow in parallel and not come together in confluences. People get angry and make their voices heard, sometimes financially.

Another issue raised by Ted Neiman addressed the fact that when people are: "handing

over thousands of dollars, what are the terms of those gifts . . . money talks. Do little gifts speak as loudly?” He found an inherent inequality in the influence of a gift. This was a topic typically avoided by most of my interviewees; they didn’t want to talk about it. One of my best informants stopped dead and pretty much ended the interview when I brought up favoritism and governance. Nobody wanted to say that big donors got perks, but perks exist in the more obvious forms of lunches with speakers, private dinners at the Presidents’ house and galas. Money never exists in a vacuum. Philanthropy by definition causes changes and if those changes happen to benefit the donor, especially a donor that might keep dollars flowing into the pipe indefinitely, it seems a matter of course that they will receive special favors.

Ted Neiman: “Philanthropy is fantastic, there is a lot of money raised, but it hasn’t made the place more affordable. Why can’t all these brilliant business people figure out how to build cheap dormitory housing? Have people pay on a sliding scale. How many people without money do you want here? How about a campsite at the Whallon Farm (acreage across Rte. 394 containing the golf course and additional land for future development) for folks with trailers? There is no sincere interest in bringing in lower income people.”

Another of his concerns was that the administration’s actions were becoming removed from the original purpose of the Institution by recent fiscal and programmatic growth. “The expense of the place has displaced friends that can no longer afford to come.” Neiman laments the loss of the religious emphasis, “it was begun as a religious community and this is left out of the marketing. The bigger is better attitude prevails. The staff, musicians, and teachers can’t afford to be here”. This was a recurrent theme, some finding it an inevitable outcome of growth, others noting that the gentrification caused by the revitalization was making Chautauqua an elitist stronghold with an economic screening process. Many said “the little old ladies with

tennis shoes and the ministers and their wives” were no longer coming here. It is as if you couldn’t afford to be here, you probably aren’t one of us anyway.

The son of a past foundation President, Walter Tucker, noted that sacrificial giving was pushed by the Development office by the misperception that because “they’re here, it means that they can do more than they can”. There were artificial goals set by the Development office. “\$50 from a retired school teacher is a major contribution. Pushing the envelope makes people uncomfortable”. From his vantage point he didn’t see how people could increase their level of giving. He trusts that those who believe in the place will support it as much as they would their churches. This perception is important to note. Some donors for their own reasons, governors on income, are restricted in how much they can or want to give. Many property owners don’t give at all figuring the gate fee they are required to pay and other various fees for parking, trash collection and utilities is quite enough. But even though Walter Tucker did not at the time see how the Institution would reach their campaign goal, they in fact did and surpassed it by over a million dollars. The discourse is flexible and powerful enough to contain dissent and, in fact, to channel it enriching the dialogue. Note the focus in this dissent is on philanthropy and access to programing decisions staying true to central themes while at least at Chautauqua the unitary thrust is not undermined and the philanthropic goals are still met.

Roger and Beatrice Yoder are a couple with deep ancestral roots at Chautauqua, late 1920s for his family, turn of the last century for her. They met here as did her mother and father and his son and wife. He was on the Board for three terms during the early revitalization; he served on the committee of the Second Century and Chautauqua Challenge Campaigns. They were in the \$25,000 to \$50,000 giving category. Their criticisms were candid and resulted in their reducing their contributions which had been substantial. They felt the tour buses circuiting

the grounds made Chautauquans part of a “freak show”, like reenactors in a living history museum. “We’re becoming a spectacle being put on display. Chautauquans are not “clients”; we have lived here for decades. It’s our residence. There are hundreds of us. We are not part of the tour program with a house.” Some of the old time Chautauquans who have been here for generations are having trouble paying the taxes on their homes. Much harder times for them, say the need for a new roof, and many will have to sell the family home. “Now we get these two-week vacationers who think this place is a resort”.

The Yoder’s point of view was well known on the grounds; “administrations come and go and we are left with the results of their actions”. They represent the conservative side of the discourse concerning keeping Chautauqua “like it used to be”; a model of “a safe village where eccentrics are tolerated and kids play freely”. They come back to get connected to the values held here: children, family, neighborhoods. On economics—“affluence of the society enables our people to come here while those who come for the short term experience a loss of the potency” of the Chautauqua experience. It is difficult for families, they get fragmented and resources are scattered. With taxes being high on the grounds, properties of the older families are being sold. The Yoder’s felt the need for new families to start building their history here. The condominiums were changing the place as short term stays were turning the place into a vacation resort and not the old time season length stay that transformed people and families. For some, it is a matter of course for their families to come to the grounds and get together. The Yoder’s point out that that story does not apply to all Chautauquans. There are no all-inclusive narratives in the discourse.

Scale is important, the Yoder’s felt Chautauqua was becoming too crowded. “The growth will overpopulate the place if it continues and it will *destroy the community*. We need to

prepare for the future in a sensible way”. They were concerned that there were too many memorial gardens and people were getting into feuds over them. They said everything has a price tag on it and it was a form of harassment. The *Chautauqua Daily* is a fund raising tool. “Money, money, money. The constant emphasis on giving makes this place less enjoyable and it’s annoying”. The growth psychology is business oriented versus resident oriented for those who have a loyalty to living here. “In order for complaints to be heard, you have to give”.

These few individuals represent the types of criticisms of the Institution and its philanthropic efforts that I heard. The majority of Chautauquans I met and interviewed were positive and goal oriented, but in a community of this size and of varying demographics, criticisms are expected and need representation. The philanthropic discourse, spoken in the Chautauquan speech genre, contains and carries the ideology flowing through the people on the grounds. It has the ability to contain both pro and con elements on the philanthropy, the campaign and the overall direction of the Institution goals as it moves forward. The ideological discourse is a cultural element very much alive and exhibiting all the fundamental elements of a living thing and yet there is a pattern both institutionally and personally to the successful philanthropic trajectory.⁸⁵

The rich and wide-ranging nature of discourse at Chautauqua and its confluence into specific philanthropic utterances finds its expression through the thematic content, style, and the compositional structure of the Chautauquan speech genre. Where the individual and Institutional discourses meet, respond and incorporate these major institutional themes into themselves there is an ideological inculcation of fundamental ideals on both sides. John Cavins spoke of being a better person within the Institution as place which prompted him to philanthropic action. Those

with significant philanthropic clout changed the Institution by manifesting their discourse. The Lennas not only expanded the ability for music on the grounds through the donation of a rehearsal hall, they opened the door to more Catholics by providing a Catholic House at the center of the grounds. The thematic core at the heart of the campaign retained a certain centrifugal flexibility that permitted individuals and the Institution to creatively satisfy each other's needs by attending to the philanthropic goals of the campaign.

Core Philanthropic Processes

At the onset of the Chautauqua Challenge Campaign 79 volunteers were trained in making solicitation calls, or asks, on prospective donors. Solicitation is ideological discourse. It is the exchange of ideas in a deftly designed process that maximizes the use of thematic content within a delineated compositional structure employing and tapping the unique discursive styles of the solicitor and the donor. The objective is deepening the donors' relationship with the Institution and a fiscal return for the campaign. An ask counts on fluency in the Chautauquan speech genre and the personal knowledge between users of the thematic ideals and symbols embedded therein.

Campaign solicitors were required to know the details of the "Design for the Decade";⁸⁶ participate in solicitation planning sessions; promote Chautauqua and the campaign; schedule and make about five calls a year; complete contact reports; support the campaign themselves; and attend campaign functions as appropriate (Chautauqua Challenge Campaign Volunteer Handbook 1993a). The training was rigorous and exhaustive when it came to knowing Chautauqua, the ask process (naming opportunities and the like) and how to avoid mistakes.⁸⁷ The volunteers are organized into "Teams", made up of eight-to-ten individuals. Each team is

headed by a “Cabinet Member” who is responsible for the teams’ work and included a staff member from the Development Office. Two volunteers call on the campaign prospect(s) assigned. They are assigned prospects based on the volunteers’ personal acquaintance with the potential donors, establishing trust, and sharing of interests and financial bracket.

That summarizes the nuts and bolts of being a volunteer. But the insider’s story, outside the footwork of soliciting is interesting. It is another solidifier for ideological exchange and addresses Ilana Silber’s request for a fourth phase to be added to Mauss’ threefold model: before “giving, receiving, and returning, is the act of asking or soliciting philanthropic giving. . . . Studying transformation in what counts as legitimate and efficient techniques of fund raising would no doubt help understand much about the nature and place of giving in contemporary settings” (1998:145). This Maussian/Silber *soliciting—giving—receiving—returning* is important to Chautauquans and adds an additional dimension to the donor-receiver process and enriches the ideological exchange. It also gives an additional layer of discourse to the interface of Chautauqua/Chautauquan interactions by revealing the legacy-building and fulfillment aspects of being in the solicitation process. It attracts new recruits to the campaigning practice when they find out how rewarding the process can be.

One Chautauquan campaign volunteer started with a description “apprehension”. Rebecca Forde: “One of the things that I said is that when you’re recruiting volunteers for fundraising and you ask somebody to help out they say: “Well yes I will, but I want you know that I just don’t want to have to do any fundraising.” Well you can’t be involved in any nonprofit and not do fundraising. You may not be able yourself to give at a very high level, but in terms of working to see to it that the budget is going to be balanced, that means except in a very rare instance, that you’re going to have to be asking other people to give. You can’t ask

other people to give unless you have made a financial commitment. And this is as it should be. So you have to do it.”

So to ask, one has to have given. It adds credibility to the solicitation discourse and levels the playing field. It is the enactment of the generic themes of responsibility and stewardship. The solicitor isn’t asking their friend or acquaintance to do something they wouldn’t do themselves. This might be one reason it is so easy to turn down or hang up on a phone solicitation. There is no personal connection to the person and a paid solicitor asking for dollars with no attachment to the cause smacks of insincerity. It cannot persuade effectively.

Personalization in Solicitation

There is an additional component in the solicitation process. When one person asks another for a gift they themselves have given, it is done with discursive stories and cordiality. I was told by one solicitor that she had a kit bag of stories she used in personalizing Chautauqua during asks. There are stories that apply to each neighborhood, and general ones like seeing a deer cross the lawn in the morning that bring the personal touch to the dialogues. Philanthropy is guarded: “What people can give or are willing to give is very private kind of thing. . . . relative to their own circumstances.” Chautauquans support other organizations outside the grounds and making a choice to donate to Chautauqua has to fit in with the rest of their philanthropic philosophy. It might be prohibitive to donate with children in college, or another similar circumstance that is relegated to the privacy of their household. Alan Flagg who was a first generation Chautauquan himself,⁸⁸ had brought his family and many friends to the grounds. His emphasis was on family, how they were provided for and how Chautauqua was the backdrop for their upbringing. His company was family based. They had traditionally given \$15,000-16,000

a year, \$10,000 of it on Old First Night, and \$2,000 for scholarship in his mother's honor. At one point, St. Bonaventure University ran into problems and being a major supporter there, he had to hold back on donations to Chautauqua. He was then (1994) building back up to \$6,000 to \$8,000 thousand that year (1993) and hoped to be back to \$15,000 to \$17,000 in the next year and ended in the campaign in the \$5,000-\$25,000 category. Solicitors have to honor these personal financial situations and decisions.

The ideological dynamics The exchanges are centripetal. I was told that these exchanges of significantly emotive experiences are carefully orchestrated but are guided by the common sense and personal knowledge of the donor by the solicitor/friend. Forde: "But one of the things I said, and I did work with a training group this spring, is that when you ask people to give a large amount, we are talking to them hopefully with an experience that has been meaningful in our lives and is meaningful in their lives. The kind of conversation that you have is an *important sharing kind of conversation*, and I think that's what people don't realize. You get so that you treasure and appreciate those experiences in your life *where people are really talking, and talking to you about things that they care about; their hopes, dreams, worries and that's often exactly the kind of experience you have when you're talking about Chautauqua*. You're talking about their ability, desire, and hopes in making a large commitment and it's a special kind of thing. *It creates meaning and it's so personal*. It's very personal and each person has their own group of stories. So that even as a solicitor in a role that you thought you would hate, *you are now enriched by that experience in a personally meaningful kind of way*. It's an aspect of fundraising that most people would not expect".

And pure Chautauquan is spoken.

This is a critical moment in Chautauquan philanthropic discourse and one I would venture is universal to a reciprocal philanthropy. Mauss explains the gift giving process as fundamental to societies, groups and the morality of individuals. It is a cohesive practice, shaping cultural responsibilities, exchanges, interests, and obligations (1990:2, 73, 75-76, 78). The solicitor and the donor merge meanings and share a moment where at least three things happen: a). both the donor and the solicitor are deeply engaged in a powerful dialogic exchange. Utterances are fomented that bring some of the most important things in life to the forefront and to a place where they can be acted upon (secondary speech genres). Juxtaposed to the fact that most exchanges are quotidian and relate to the mundane: greetings, weather, you like or see this or that?; etc. (primary speech genres) (Bakhtin 1986:61-62). *These* exchanges are heavily loaded with ideology. b). The donor can clearly see that a gift will make a real and long term difference based on the philanthropic themes: legacy, stewardship, the community; and, c).



Fig. 7-5 Miller Bell Tower. Benson © 2011

the solicitor is pulled deeper into the ideological exchange defining their own purposes, gifts and relationship with the Institution (Silber 1998:141). The high quality of these exchanges reported by volunteers, the deeply penetrating meaningful nature of these rare types of discursive conversation become part of the reward process and a powerful philanthropic stimulant.

Mary Douglas in her 1990 introduction to Mauss's "The Gift" asks "where does the reciprocal system get its energy" (1990:ix)? *It gets a great deal of it right here.* The enlivening

and poignant exchanges invigorate the people making them. The ideology flowing in the dialogism of those moments carries an *ideological charge* that is, taking a line from what poet Gwendolyn Brooks called, “*concentrated life*”.⁸⁹ It allows for an impassioned and suffusing feeling of impact and action. Without this powerfully meaningful experience the solicitation process would be bereft of honesty and be quite sterile. It takes the full package of ideological language and themes to make for a commanding philanthropic interchange. Life, family, legacy, place, art and the other high humanities are rolled into the discourse and the ability to act upon them becomes a bonus, a duty, and a benevolent and gracious gift of the self. The *self* becomes a valuable resource in that moment.

Chautauquans who had a deep understanding of the philanthropic process, addressed the way giving deepened their experience of Chautauqua. Rebecca Forde: “The realization that Chautauqua is a rare and precious sort of experience is that it makes you both appreciative but also increases your sense of responsibility toward it.” When I asked her why this was so, her response was: “Because I think that the people who are presently part of something, *have to feel commitment and responsibility to make it vital and a living part of your life*. I think one of the great strengths here is when people become involved and share a responsibility, whether it’s in a club, or my own exposure primarily through the board of trustees and certainly the fund raising efforts. *There’s a change that takes place in terms of the growth that occurs*, and I have seen that happen in almost every instance no matter what the personality or prior commitment the person had. They are really enriched by the experience and certainly by their service to Chautauqua and their future is enriched by having had that kind of experience to go with their philanthropy. And it’s a neat thing. And I think it’s very important. I think it’s the life blood of giving here.”

So in the act of being *enriched* by giving, Chautauqua's ideology becomes more deeply embedded in the Chautauquan's overall experience. By giving, individuals and couples or families are incorporating the Institution into themselves, by merging themselves at the *ideological confluence* of the process through their philanthropy. This "*change that takes place*" is what I have been trying to definitively pin down throughout this entire project. It is the governing moment where the ideologies meet and merge into one another providing a collapsing of the distinction between subject and object. It is the boundary where the listeners *inner monologue meets the others ideas*, but in this instance instead of just information being altered and consumed, an *interaction* takes place that alters the Institution in historically meaningful ways (Bakhtin 1986:61-62). *Change occurs, ideology is transferred.*

"In all areas of life and ideological activity, our speech is filled to overflowing with other people's words, which are transmitted with highly varied degrees of accuracy and impartiality" (Bakhtin 1981:337). The donor enters the Institution's ideology by being enriched and involved and the Institution is influenced by receiving not only a gift but also a more embedded Chautauquan who will carry and embody the Chautauquan ideology in their lives. It is a positive feedback loop or hermeneutic spiral (adding time to the process) and an affective merging of identities. "Thus a unitary language gives expression to forces working toward concrete verbal and *ideological unification and centralization*, which develop in vital connection with processes of sociopolitical and cultural centralization that is still open to the variation in human experience (emphasis mine, Bakhtin 1981:271).

Another subtype of donor emerges (Silber 1998:145). One who has themselves given to the campaign, but as a donor/solicitor is now even more enmeshed in the ideology. Advocating the Chautauquan ideals, seeing them come alive in the prospect, being invigorated from asking,

creates a hybrid that is a step above in ideological emersion than a typical Chautauquan donor. The ask process brings more of the reality of the Institution to the surface and the conversation, the utterances at work in the ask process, bring these concrete and concentrated experiences into the illuminative light of day. It is how Rebecca Forde can say that “it is the lifeblood of giving here”.

This also happened to me as ethnographer. Chautauquans invariably told me that having me question them about the Institution, about their values toward it and their giving, brought perspectives to light they would not have been aware of in any other way. A dialogically enlivened conversation on Chautauqua brought them refreshing and enlivened points of view.

Philanthropy Imitates Life

In wrapping things up I saved my favorite definition of philanthropy for last. At least from a preferential standpoint, the following had an almost Darwinian aspect to it. David Carnahan (not a pseudonym) was a substantial donor and longtime supporter of the Institution. The Carnahan-Jackson Foundation was responsible for over a million dollars in donations to the campaign and he and Mrs. Marty Carnahan were in the \$500,000 to \$1,000,000 category. Mr. Carnahan gave me two interviews and I have used the basics from my talks with him to structure the themes defined in the last chapter. His extensive experience with philanthropy through his family foundation and his personal giving brought a vast amount of information to the table.

He saw philanthropic nurturing as a virtue and a talent. That giving included the ability to become cognizant of the potential spin-offs, the good things produced, the negative things to avoid. Chautauqua was the largest single recipient of his donations. “It is more about “*giving to an idea* than to giving for bricks and mortar”. This truly comes face-to-face with giving as an

ideological activity. It is here where the ideologies of the Carnahans' and the Institution converge, enter the historical continuum and cultivate this specific place in specific ways that are "tightly interwoven with each other, becoming almost indistinguishable . . ." (Bakhtin 1981:283). Ideological ownership, once solidified, is the transfer point from outsider to insider, from other to self, from the Institution to donor and back. It is the "socio-verbal ensnaring [of] the object" that differences are obliterated and the new penetrating system "stun[s] and destroy[s]" the subject/object distinctions (Bakhtin 1981:283). Bakhtin is passionate about this, but the point is made, the distinctions are dissolved at the confluence of these ideologies. They are then shared.

Mr. Carnahan is a model Chautauquan for this study. He represents how philanthropers help the Institution sustain itself; how its governance is guided through their input; how programs, scholarships, facilities and the grounds are developed and brought into fruition with donors as partners. Without individuals like Carnahan, large and small donors, who have their heart and *genuine interest* in the "Idea" of the place (Basso 1996:xiii), it would be just another history museum or public programming platform. The *idea* is large and covered in detail here: place, program, family, community, openness, uniqueness, resource, legacy, history, stewardship, responsibility, spiritual and philosophical values, and philanthropy and its benefits. An amalgamation of values and attributes that ring true for donors as the best the human condition has to offer them (Mauss 1990:79). Being a donor makes a person "have a stake" in something larger than themselves and in doing so enlarges their life experience and the historical footprint they leave for the future.

In closing, I conclude with David Carnahans' powerful discursive definition of philanthropy: a definition *of life*. "Giving to a cause, giving it time, with time as an element, to see it grow is *creative in nature*. Things are so interrelated here; something you do will affect

something else. Hopefully, what we do for dance has a real effect on something else just *as good*.” This creative element he sees as *lifelike* in its effects and goals. Positive projects affecting each other in a long string of heteroglossic-like actions through time *imitates life*. Extending Bakhtin’s use of the term “word” for actions, I paraphrase as follows: “But no living philanthropic *act* relates to its object in a *singular* way: between the *act* and its object, between the *act* and the institutional subject, there exists an elastic environment of other *acts* about the same object, the same themes, and this is an environment that is often difficult to penetrate. It is precisely in the process of living interaction within this specific environment that the *philanthropic act* may be individualized and given stylistic shape” (emphasis mine, paraphrase of Bakhtin 1981:276).

Philanthropic acts from Carnahans’ point of view are processes of *living interaction* with the specific Chautauqua environment. They in total compose a cultural set of interactions that *nurture, guide and grow* new avenues of ideological, discursive, programmatic, and fiscal prosperity at the Institution. From this philanthropers’ point of view, his works nurture and construct good things in society, which in turn contribute to the overall prosperity of the place by creating niches for more good to take root, grow and to flourish.

Semi-Postscript:

The following is a brief *mystory* (Ulmer 1989:82-112, 209-211). It is a reflective tale from my field experience. A story of an epiphany that helped clarify issues in my research (Denzin 1997:91-92). As then Development Director Tom Becker told me his story recounted in the last chapter, he was telling his version of the larger “Chautauqua story”. His story translated into the major story from the Institution. It was during that meeting in February of 1994 when I

came to understand how the philanthropic ask works. I was at the essential stage of the conversion process. *When I came to believe what Tom Becker believed*; I recognized that the Institution's story was factual and required my support. Our ideologies converged, were in confluence. His story was sincere and told with such credibility that I *believed* what he said and became a convert.

The philanthropic act takes place between people. Galas and literature and campaign thermometers are the standard accoutrements, but the act of philanthropic conversion takes place in the discourse between individuals. After being on or around the grounds for a two years, after doing much of the research for the history chapter, after acquainting myself with the depth and breadth of the program, after conducting numerous interviews with people and living the participant-observation life: I had what I felt was a solid grasp of what was true for Chautauquans. I let the resistance slip on my objectivity and I surrendered to Becker's story. He sold me, and I understood, from as close as I will ever come to being an insider, that Chautauqua *deserved* to be supported.

This is the juncture where Bakhtin wrote of people choosing through an epistemological filtering process a set of meanings that best explain the situation at hand (1981:293-294). This dialogic process is where Becker's and my meanings intersected and a dialogic relationship of ideological confluence became the cultural context through which we decisively *communicated*. His met mine and in this exchange of ideology, my inner dialogue, the ideas I had on the Institution, were infiltrated by Becker's story and a fresh understanding took place within me.

Earlier I stated that for Bakhtin, while the listener creatively engages in the dialogic process, the listener attempts to guess, to imagine how the other's ideas would be played out from his point of view (Bakhtin 1981:348; 1984:78-92). Here I incorporated Becker's narrative into my inner dialogue, eventually *making it my own*. This did not happen overnight. I realized later that the event had transpired. That my response to Becker's narrative combined with what I learned was the pivotal point in the research process. It was *the* point where I could state with certainty that I understood what happens when the donor finally decides to *write the check*. It is at the juncture of incorporating the Institution's ideology through another's finely crafted narrative, that the donor *trusts and believes* the other's dialogue. A new internal narrative is created that affirms that discourse as truth, or truth enough, and they wake the variety of themes involved with a philanthropic act. Legacy, stewardship, growth, personal involvement, governance, responsibility and so on; that are at the roots of philanthropy at Chautauqua. Once qualified and incorporated the ideologies merge and the checks get written.

Conclusion

This chapter and the prior chapter tell the stories that compose the philanthropic discourse at Chautauqua. These



Figure 7-6 Athenaean Hotel. Benson ©1994.

stories are from the Institution and its histories, from the breach of those in the gap between formal Institution staff and Chautauquans and from Chautauquans. The Chautauquans provided

a variety of points of view from those that saw Chautauqua as an intimate part of their lives needing nurturing and protection, to the business oriented perspective of proper management to those who did not like the results of the current philanthropic efforts at Chautauqua. This is not an abstract place, it is concrete, a utopian experiment that has lasted since 1874. I had grown men break down and weep expressing their love for this place. This discourse tells Chautauqua's story to itself and allowed me as ethnographer to use discourse as a larger mechanism to tell the philanthropic story. My role was to synthesize and interpret by expanding on Bakhtin, Mauss and Basso putting their theories into a productive triangulation to illuminate philanthropy as a vigorous form of human discourse.

Philanthropic studies can learn from adopting speech genre analysis for key themes and terms and developing associated definitions used in the discourse surrounding solicitation for use in field studies. I believe this to be the pivotal contribution of this work. Philanthropy's heteroglossic nature is acted upon by centrifugal and centripetal forces that coalesce into ideological pools of information that are then structured, exchanged, and multiplied. Acknowledging the complexity of philanthropic giving is important and I hope that I have satisfied some of the questions Christopher Jenks raised searching for more ethnographic data on the wide range of reasons for giving (Jencks 1987:321-339).

For those employing Bakhtin's vast range of ideas in their work, I found that adapting his theory to include all kinds of media as forms in ideologic exchange helped me greatly. The inherent flexibility of Bakhtin's work to operate in *elastic environments* allowed me to expand the communicative mechanisms of speech genres to include electronic media and visual and literary images. This is important as Bakhtin's reach expands into interpreting forms of electronic and social media as these more recent forms of communication become prevalent

across the globe. His penetrating work on Dostoevsky is applicable to these other forms of communication (Bakhtin 1984). I wonder what he would have thought of Facebook?

As to anthropology in general, “studying up” following Laura Nader and George Marcus is important to the credibility of the discipline (Marcus:1989a, 1989b, 1990; Nader 1972).

Wealth and power have always acted in tandem, studying how philanthropy worked was a polite and non-abrasive way to study how the wealthy exert their influence on the world. It was Noam Chomsky who argued that: “It is the responsibility of intellectuals to speak the truth and expose lies” and that by understanding the mechanisms of “ideological control” we can effectively learn how to counter them (Chomsky 1967:1; 1986:276-286). This study directly addresses the construction and use of ideological mechanisms employed by the wealthy and which in turn can be used in other areas of influence such as corporate boards of directors or buying methodologies of the Nuevo-riche, but it also addresses the responsibilities of the wealthy to give back and nurture the society of which they are also a part.

This work is positioned between Nader and Marcus and the works specifically addressing philanthropy of Ostrander and Ostrower. Teresa Odendahl’s book *Charity Begins at Home: Generosity and Self-Interest among the Philanthropic Elite* opened the door for this study (1990) and Francie Ostrower’s book *Why the Wealthy Give: The Culture of Elite Philanthropy* (1995) and Peter Frumkin’s, *Strategic Giving: The Arts and Science of Philanthropy* (2006) were companion studies reinforcing the need for more philanthropic ethnographies. This work uses ideological exchange as its focus, I’m sure there are other approaches of equal validity that will produce anthropological studies of great merit. I would welcome a focused study on just how individuals appropriate a speech genre; how they learn about it, incorporate it, learn how to work within it and then become full-fledged speakers.

As the ethnographer I came to know the Chautauqua genre and recognize when it was employed. Having Tom Becker convince me of the value of Chautauqua helped me experience what it was like to incorporate an ideology. Not having the means to support Chautauqua makes this interesting. Although I was fluent in Chautauqua by the time I was done with the interviews, the ideology polish wore off over time. I picked up the less elegant “town-and-gown” genre of living year round in a community that swarms with tourists in the summer. But Chautauqua has been good to me and I am easy prey for the grounds and joining into the fracas of the Chautauqua Experience every time I’m there. It’s a utopia, it costs; but its ideals and the fact that I was privy to the campaign at the historical point where Chautauqua stopped fighting disaster and started capitalizing on prosperity gave me a unique insight into what Chautauquans valued and why they chose the good fight and triumphed; a concrete act of the conscience of capital.

Post-Defense Epilogue

The time period of this study was 1991 to 1995. Much has happened between then and 2012, the time of the final defense of this dissertation. My committee encouraged two things: a). that I conclude with a bit more reflexivity, inserting myself into the piece to give the reader more context for its writer and to, b). address in that reflexivity pertaining to issues of class. I agree and in addition I will include an update on Chautauqua from two key players in this dissertation: Tom Becker who was the Development Director at the time of the study and who is now the Institution’s President and David Carnahan who provided me with the clearest understanding of philanthropy that led to its deconstruction through Bakhtin’s speech genre approach.

I am originally from Chautauqua County, born and raised in Jamestown at the opposite end of Chautauqua Lake. Jamestown was a traditional industrial town known for its furniture production and other factory output. It went from a bustling city of 50,000 in 1960 to its current 30,000 as the factories closed and moved south or overseas. I grew up watching this decay never knowing that Chautauqua was going through the absolute opposite experience of revitalization. My family was from the middle class, we never had a summer home or other indicators of wealth. No one in my neighborhood did and we didn't expect any different. My childhood experience was much more like a lifelong run of the "Little Rascals" than the kids at Chautauqua attending the Boys and Girls Club and waterskiing on the lake.

I had no real prior relationship with the Institution other than to attend some of the "specials" on Friday night and to cruise the grounds during adolescent excursions. From a class perspective, I was coming into Chautauqua from the lower end of the spectrum. My academic credentials leveled the class playing field for me. The study became a transformative experience that let me get to know Chautauquans personally, realize they were people like anyone else. And then as time passed, I returned to my old feelings of class, of being an outsider, albeit a very informed one. I am sure this is a common experience among anthropologists. My travel was through class in America, into some of the habitus of the upper strata and back again. Importantly, this group of upper class Americans valued learning and protecting a place that values learning, the arts and history. I can only wish all of the upper class in this country had the same values, we would live in a radically different world.

More anthropologists need to make this journey. At the time of this writing, the "Occupy" movement is winding down and the 99 percent have been rallying about social and class equality. Without anthropology's unique reach to make the 'other' exotic, we will not have

the kinds of studies that will reveal how the rich and powerful function. The rich and powerful will not be able to read about *themselves* from our academically rigorous point of view and perhaps see room for socially responsible change. Anthropology as a discipline has a responsibility to change the world by making behavior transparent and accessible to the public. I wish we had our own spokesman wrestling from a sound anthropological perspective with the rancorous media hosts populating the news networks.

I decided on approaching Chautauqua when my enthusiasm for working with the New Zealand Maori waned upon the birth of my son Hunter. All of a sudden travels to mysterious lands among exotic people changed to returning home and bringing my larger family back together. This presented a quandary because I knew it would radically change my career prospects as an anthropologist. A minor epiphany arose from this crisis when I considered Chautauqua Institution. Anthropology's track record for studying wealth in industrialized countries was poor. From my inexperienced perspective, I knew Chautauqua was a place of wealth, not entirely correct, but mostly right, and that the Institution would make a fine topic for a dissertation.

Edward Bruner was my advisor at the time and a pioneer on anthropological tourism studies. I had taken his seminars on the topic and knew the basics. My first approach to Chautauqua was to study it from the perspective of learning vacations and tourism studies. I sent out proposals for funding to the National Science Foundation, Wenner Gren, and was turned down two years running. In 1992 I took out a maximum student loan and using all of our savings, moved back to Mayville, just four miles from the Institution. There, I conducted my first season of field work in participant observation.

Meanwhile, I was still searching for funding. I had one of the massive printouts from IRIS funding search engines on campus and was sending out proposals to anyone with whom I thought I had the remotest chance. One of the funding agencies was the Indiana Center on Philanthropy at Indiana University and the Center for Study of Governance of Non-Profits, also at the Center. I put together a proposal on what I thought would be a sound study of philanthropy.

At this juncture I really didn't know much, if anything, about philanthropy. I was actually intimidated by the thought of prying into the whole matter. Philanthropy was what rich people did at expensive country clubs where people from my class background usually got jobs cutting the lawn. I was sure it was held as a very private matter between the yacht club types and I would have little chance of breaking through.

Then I got two letters. One from the Center on Philanthropy and the other from the Non-Profit Center at Indiana University saying they wanted to fund my study. I accepted their offers; I owe a debt of gratitude to Dr. Daniel Bratton, the Institution's President, for his opening "Three Taps of the Gavel" speech in June of 1993. He really had nothing to do with the fortuitous coincidence, but I had been granted research dollars to study philanthropy at Chautauqua and I hadn't the slightest idea on how to start asking the wealthy about what they did with their money. So sitting in the audience at the amphitheater that Sunday morning and having him say: "It is my pleasure this morning through these Three Taps of the Gavel to publicly announce this campaign, this Chautauqua Challenge Campaign". I was astonished to the point of thinking that Providence had intervened on my behalf.⁹⁰

In retrospect there were many opportunities missed. I did not press for attendance at major campaign functions, did not ask for specific amounts given (which I tracked through

Chautauqua publications), nor their individual incomes. I talked over my list of people to interview with Tom Becker, Development Officer, and did not interview those he was uncomfortable with. I did not want to interfere with the development process. It was their campaign and I did not want to be responsible for losing them a potential donor. I did not interview the Lenna's who are probably the largest single donors to the Institution outside of private foundations. They have since passed on.

What I did find was that I was warmly received into nearly every household where I conducted an interview. My original biases on the nature of people of means were dispelled. Not every Chautauquan I interviewed was wealthy. Chautauquans were friendly, open, hospitable, sincere, and usually very forthcoming in their attempts to help me learn about my topic. I garnered a reputation among them that amounted to my interviews helping them learn more about their unspoken ideas on Chautauqua, benefiting us all.

My interviewing skill increased as I went along. I strove to keep things comfortable and amiable. I am not sure I would follow those same procedures now. I feel if I had pressed people on points of governance and favoritism associated with giving, I would have had a broader story to tell. I also wish I had interviewed more of the non-professional staff. Many of the stories I listened too from this group tainted the experience I was having in the homes of Chautauquans. Their stories were rife with mistreatment and the rude behavior they had experienced at their hands. They were the hired help treated like voiceless servants. Much of the 'town and gown' schism between Chautauqua and local people is rooted in these types of stories. I can vouch for some of this living in a nearby village and watching the behavior of those who pull away with Chautauqua bumper stickers on their cars.

Becker and Carnahan

Chautauqua has prospered since 1995. The following is a bulleted list of the campaigns since 1971 that demonstrate the philanthropic shift from small critical needs based campaigns to campaigns that advanced the prosperity of the Institution. From solving immediate and threatening problems to financing growth and new endeavors:

- 1971 Gebbie Challenge Grant, \$1 million
- 1979 Second Century Campaign, \$8.5 million
- 1987-1989 Overture for the Future Campaign, \$5 million, \$538,100 over goal
- 1991-1995 Chautauqua Challenge Campaign, \$22.5 million, \$1.66 million over goal
- 1997-2001 Renewal Campaign, \$32 million, \$8 million over goal
- 2004-2008 Idea Campaign \$48.7 million, 4 million over goal
- 2011 Chautauqua Foundation assets \$61,343,364
- 2011 Chautauqua Annual Fund \$6,272,552

As is evident, the last three campaigns came in significantly over goal. These numbers reflect the prosperity that flooded Chautauqua during and since my study. This reflects the depth of philanthropic credibility that Becker, Bratton and Miller initiated and carried to fruition. It also reflects a tremendous amount of change in Chautauqua's culture. Many new people acquired property on the grounds, many families who could no longer afford it had to sell their homes and become Chautauqua transients. Programmatic focuses shifted and gentrification, new condos, homes and Institutional buildings have populated the grounds. Philanthropy has revitalized the place, for some a boon, for others a bust.

I conducted two concluding interviews in the winter of 2011 and summarize them together to reproduce the interplay of the view points on Chautauqua. They were with Tom Becker and

David Carnahan who were both open to speaking with me and both represented two diverse points of view on the last 20 years of change at Chautauqua.

Tom Becker as President promoted the prosperity that philanthropy has brought to Chautauqua. As the Institution's previous Development Director he had a heavy hand in creating this success and was proud of the Institution's current position and its bright prospects for the future. David Carnahan who had been on the many Chautauqua Boards, committees, ask teams and who with his wife Marty had donated millions to the Institution, sold his home on the grounds and has dropped all ties with the Institution. The gentrification that represents security and prosperity for Becker represented an about-face for the core values that Carnahan though represented Chautauqua.

Becker still promotes the Chautauqua he espoused in Chapter six, a vibrant place where people can enhance their intellectual character, find information from experts that challenge them to go out and be better citizens in the world. The inevitable gentrification was is another historical shift in Chautauqua much like that of the Bestor years or the malaise of the 40 through the 60s. This historical shift has brought a more permanent Chautauqua that has had the foresight to build a solid Foundation of endowments and funds to secure the future for the place so it will hopefully never be in dire straits again. He sees an ever increasing sense of engagement with the world around Chautauqua, from helping to preserve and manage the problems with Chautauqua Lake to larger political and social crisis issues facing today's audiences. His administration is seeking ways to open Chautauqua's doors to more diverse audiences. Specifically by creating liaisons with African-American churches to bring programming and participants to the grounds that more truly reflect the racial character of the United States. He has noted that there are more and more younger families investing in Chautauqua and bringing their families for longer stays

there. He said that there is nothing more powerful in a family dynamic than “a child watching his parents learn”. The changes wrought by philanthropy were inevitable and while stabilizing economically could not make everyone happy and the costs associated with those changes while regrettable, were the product of making Chautauqua sound for moral intellectual growth of future generations.

David Carnahan on the other hand has very different view of Chautauqua’s success. Carnahan after growing up on the grounds, supporting it with major philanthropic contributions of time, money and expertise has sold his home and severed his ties with the Institution. What he called the “corporatization” of Chautauqua had many side effects which for him destroyed the heart of the Chautauqua ideal. Corporate “lingo” started infiltrating meetings and exchanges. The corporate “types” who came in as part of the revitalization didn’t understand the traditional Chautauqua. Everything was coming down to a cost analysis and that new paradigm left Chautauqua run by “managers” instead of administrators.

The shift in property costs and the influx of ostentatious “mcmansions” on the grounds caused serious changes to the neighborhoods. When people could no longer afford their homes, the new folks who moved in were no longer the families who the Carnahans had shared their lives at Chautauqua. They were strangers and even though a friendly place, they could not replace the deep seated long-term relationships that made their neighborhood what it was. This happened all over Chautauqua. He also was very concerned with the shift in the religious programming of the place. The idea of a Christian heart for Chautauqua had been ecumenically leveled and relativized leaving a lot on the plate programmatically, but little of flavor or true Christian substance.

I interviewed Tom Becker after David and the two of them are still friends and have a great deal of respect for each other. Becker was well of aware of Carnahan's positions and said if anything Chautauqua had become an even more Christian place by becoming more opening and welcoming to other faiths. Carnahan saw this as watering down the milk.

These two stories are being repeated in various ways about Chautauqua by Chautauquans on both sides of these multifaceted issues. There is little doubt that the change has revitalized a place that could have disappeared into a small community by the lake. But for others the cost of this success has been too high and too many have been left or forced out of the new Chautauqua. Centripetal and centrifugal forces at work in culture, finance, dialogue and people. Chautauqua will continue and if on track will have a larger and more influential impact on American culture, the one it was designed to have. Those who have been left in the wake of these changes I would think would admit to this truth about this powerful new future even in the face of the loss of what they had held most dear about the place. Ideas and purposes inevitably change and the Chautauqua Ideal has changed with them.

¹ For quick introduction to Chautauqua please view this video: <http://www.ciweb.org/news/2010/11/11/share-chautauqua-an-american-narrative-with-family-friends.html>

² See for details on this encounter between Maori and an American anthropologist see (Freeth 1990; Hanson, 1989, 1991; Levine 1991; Nissen 1990; Scott 1990; Wilford 1990a, 1990b; see also Ballara 1986).

³ "A topic of mathematics, the **Julia set** and the **Fatou set** are two complementary sets defined from a function. Informally, the Fatou set of the function consists of values with the property that all nearby values behave similarly under repeated iteration of the function [centripetal], and the Julia set consists of values such that an arbitrarily small perturbation can cause drastic changes in the sequence of iterated function values [centrifugal]. Thus the behavior of the function on the Fatou set is 'regular', while on the Julia set its behavior is 'chaotic'."

http://en.wikipedia.org/wiki/Julia_set

⁴ Writing about Bakhtin, and Holland et al. include the significant writings of L.S. Vygotsky, comprises a Bakhtinian speech genre all its own.

⁵ Google Earth provides a visual overview, but has yet to photograph the streets for a Street View. Flickr also houses a pool of Chautauqua pictures: <http://www.flickr.com/groups/chautauqua-institute/>. I recommend using [Google Images](#) for additional photographs and [YouTube](#) for videos. At June 1, 2011 there were 378 videos under "Chautauqua Institution": http://www.youtube.com/results?search_query=chautauqua+institution&aq=4

⁶ Small 'c' cultural referring to the arts.

⁷ This number has certain inherent problems. Andrew Dickson of the Communications Office explained that while the Institution followed ticket sales and bases its annual numbers on those sales, this number does not account for those who purchase tickets for more than one event. One person may be counted many times over the season. But

to smooth out the incongruity children are not counted as of 1996, which according to Mr. Dickson, balances out the extra numbers from the sale of multiple tickets.

⁸ The majority of these were small town and villages who hosted a traveling tent "Chautauqua" every summer with speakers, singers, lecturers and entertainers. Elvis Presley starred in a film about such Chautauquas in "The Trouble with Girls" 1969. Other Chautauquas were communities like the one at the Institution, all smaller, some 26 of which still survive today, are growing and are networked together and whose delegates meet at the Institution at the end of every summer.

⁹ I made some calls and got onto the grounds the first day Clinton was there. I faxed the Athenaeum and asked Bill and Hillary out to lunch, I got a "suitable for framing" letter from him expressing regrets and expressing interest in this dissertation.

¹⁰ Chris Redmond supplied through his "Handbook" the topics from the following list I have categorized under "Grounds": Alumni Hall, Amphitheater, arboretum, arcade, architecture, archives, art school, arts quadrangle, Athenaeum Hotel, banners, bats, beaches, Beeson Youth Center, Bellinger Hall Dormitories, Bestor Plaza, bible, Bishop's Garden, bookstore, bowling green, Boy's and Girl's Club, Brawdy Building, Brick Walk, bridge, Campbell memorial Garden, Campbell Room, Carnahan-Jackson Studios, Central Dock Office, chapels, Chestnut Stump, children, Children's Beach, Hall of Christ, College Club, College Hill Park, Colonnade Building, commons, Connell Memorial Studios, Coyle Pavilion, Dead Man's Cave, denominational houses, docks, dormitories, Education Hall, Elizabeth S. Lenna Hall, Elm Lane, Emporium, Festival Market, Higgins Hall, Highlands, Historic District, Hospitality Desk, Jewett House, Kellogg Hall, Keystone, Lincoln Dormitory, Lincoln Park, Lodge Dormitory, Main Gate, Main Parking Lot, Market Gate, Massey Organ, McKnight Recital Hall, Men's Club, Miller Bell Tower, Miller Park, Miller-Edison Cottage, Hall of Philosophy, piano shacks, pier, Pier Beach, Pier Building, Pioneer Hall, plaques, playground, practice studios, Pratt Avenue, President's Cottage, privacy, radio, ravine, restaurants, Rose Cottage, St. Elmo Hotel, Sample Playground, Seaver Gymnasium, sewage treatment plant, Sharpe Field, Smith Memorial Library, Smith-Wilkes Hall, South Gate, South Parking Lot, Stow, Summer School Dormitory, Tall House, tennis courts, Thunder Bridge, traffic, trees, University Beach, University Hill, Whallon Farm, wicker, Women's Club, Youth Activities Center.

¹¹ The Institution has made inroads toward producing their program in the Internet. The website changes regularly <http://www.ciweb.org/>

¹² There are strict building codes that are enforced by a committee that censors all construction plans for both renovations to existing structures and for new buildings. The 1950s saw a the development of what is referred to as the "North Coast" a series of expensive homes built in the styles popular to that period. They are completely mismatched to the Victorian theme of the grounds and the Institution's Board of Directors vowed to not let this be repeated. Renovation plans for existing homes and plans for new homes or condominiums must follow the Institution's Architectural and Land Use Regulations. They are also strictly monitored to keep the neighborhoods thematically matched. Most of the older homes were not used year round and consequently in renovation are gutted to the studs, rebuilt almost completely and up to today's building codes. Such renovations have been known to be in excess of a million dollars and have renovated everything from the foundation to the roof.

¹³ The following is a list of topics from Redmond's text I place under the category "Program": Alumni Hall, Amphitheater, art school, Art Gallery, Artists in Residence, ball, band, banners, basketball courts, biblical arts workshops, bike rentals, Bird, Tree and Garden Club, boats, books, bookstore, bowling green, box seat, Boy's and Girl's Club, Chadakoin Review, chamber music, "Chautauqua Challenge", Chautauqua-Belle peddle steamer, Chautauqua Lecturer, Chautauqua Movement, Children's School, choir, Hall of Christ, Christian Focus, church suppers, cinema, classic film festival, CLSC, Conservatory Theater, College Club, coloring books, concerts, courtyard, dance, docent tours, drama, Family Entertainment Series, Festival Dancers, Festival Orchestra, lectures, library, Library Day, Massey Organ, master class, Hall of Missions, Morning Worship, museums, parks, Peace Society, Hall of Philosophy, picnic, Pier, Pier Beach, Pioneer Hall, Pre-Concert Lectures, recitals, rehearsals, Religion Department, roller blades, Run for Fun, Sculpture Garden, Seaver Gymnasium, Sherwood Studios, sidewalk sessions, skateboards, skiing, Smith-Wilkes Hall, Special Studies, specials, Summer Gallery, Summer School, Sunday School, swimming, Symphony Orchestra, Theater, Theme Weeks, Thumbelina, ticket office, tourist attractions, tours, University Beach, Visitor's guide, walking, walking tour, weather, WJTN, Writer's Center, Writing Symposium, Young Readers, Program, Youth Orchestra.

¹⁴ The following is a list of the first week of the Special Studies Program from the 1998 season: Computers, Dance, Creating Balance, Effective Problem Solving & Innovative Decision Making, Mental Fitness And Memory Training, Your Creative Spirit Building Self Esteem-Developing Essential Skills, Psychophysical Education-The Missing Ingredient, Junior Sailing Programs For Beginners, Junior Sailing Program For Intermediates, Chess,

Advanced, Chess, Basic Chess, Supervised Play, Young Boaters' Safety Course, Bridge: Improve Your Game Through Supervised Bidding & Playing, Basic Juggling For Thinkers, Doers, & Dreamers, Calligraphy: Bookhand, Mat Cutting And Framing, Faux Finishes, Relief Woodcarving For Beginners, Woodcarving, Paint a Bouquet, Ukrainian Egg Decorating, Advanced Ukrainian Egg Decorating, All American Baskets, Herbal Teas, Photography, Nature, Aerobics, Stretching and low impact Aerobics, Reiki-Ancient Healing For Modern Times, Hatha Yoga, Complete Stretching Using Hatha Yoga, Tai-Chi-Quan: Exercise & Philosophy, Feeling Better Exercises, Spanish, Beginning, Telling Our Stories, Memoirs & Fiction, Wry Women's Writing, The Story Of English Through Four Versions Of The Lord's Prayer, Music, Ella Fitzgerald: The Recorded Legacy, Judaism, An Introduction To Dreams, and The Care Of The Soul, Short Course In Christian Mystics, Storytelling: The Interpretation Of Fairy Tales, Bad News: The Erosion Of Ethics in The Media, Nuisance Repairs, Buckminster Fuller's Path To The Future, The Lure Of The Labyrinth, Famous Women In History, Chautauqua Classic Film Series, Sign Language For Children, Reading Enrichment For Primary Readers, Reading Instruction For Beginning Readers, Real French For Real life.

¹⁵ The Everett Center for Jewish Studies was established in 2008 and the Center's building was built in 2009-2010: <http://www.jewishcenterchautauqua.org/>.

¹⁶ Some of the topics for the 1998 season are as follows: Dreams and Care for the Soul; Women's Spirituality for Daily Living; Abraham Joshua Heschel: Mystic, Poet, and Prophet; Explore Creation Spirituality through Journaling; Exploring the Religions of the East; Judaism as Jesus Lived It; Witnessing as a Christian in a Pluralistic World; on Becoming Philosophical; the Use and Abuse of the Bible.

¹⁷ I attended my first the 1993 Old First Night then again in 2011. If there were any changes, I couldn't perceive any.

¹⁸ Pete and Leota Boroff, two of the most hospitable and dedicated Chautauquans I had the privilege to meet, told me of this idea. They suggested the quote from "Ironweed" at the opening of the section when I talked to them at a Memorial Day cemetery cleanup.

¹⁹ According to a 1991 Nicholas Applied Management report commissioned by the Institution, the average Chautauquan earns an average of \$50,000 or above annually (\$81,905.46 in 2011) and holds a Masters' Degree. Many of the 68 individuals I interviewed (some multiple times) had careers in business holding positions in upper management or were part of the administration.

²⁰ The URL for a summary video on Chautauqua: <http://www.ciweb.org/welcome-video/>

²¹ This is called a Class B Trustee, one of two who are elected from the body of property owners to represent their interests at meetings and for the administration.

²² The Chautauqua Area Bat Association (CABA) is hosted by the Bird Tree and Garden Club and sells bat houses for \$50. <http://www.ciweb.org/btg-caba/>. As homes are renovated, bats have less access to attics threatening their population. Cornell University has conducted a long term study of the bat population on the grounds.

²³ I might add that the bookstore is much like a university of college store stocked with memorabilia by the boatload: bell tower paperweights, jackets, jewelry, tee-shirts, stationary, golf shirts, bags, pens, everything and anything that will hold a monogram. There are also art pieces and artists who will sketch or paint the family home on the grounds as an additional reminder of the Chautauqua experience back at their residence. More than one interview revealed that taking back souvenirs was critical to keeping the Chautauqua flame lit between seasons. License plates with a version of "chaut" are common and in New York State plates can be ordered with the Miller Bell Tower stenciled along the right side.

²⁴ The Bestor Plaza webcam is here: Bestor Plaza cam: <http://www.ciweb.org/webcam/>

²⁵ Traditionally, and I mean those Chautauquans who grew up here prior to 1980, Chautauquans went through a socialization process of summers on the grounds: Children's School, Boy's and Girl's Club, and a summer job on the grounds. There may still be Chautauquan children who work, but the shift to short term stays and the additional influx of wealthier clientele have transferred these jobs to teenagers living in the area year-round. My son worked there five seasons running sound, became a supervisor and is now in Law School.

²⁶ Named after Jay Seaver who was credited as one of the first to use a physical education programs within an academic curriculum. It was also one of the first places in the United States to develop the game of basketball.

²⁷ The new district called the Chautauqua Lake Central School District is still small with under a thousand students, but they have a new \$45 million school building and campus built with state aid in Mayville at no cost to local taxpayers.

²⁸ Disney Development Company, 1991 The Chautauqua Experience: A Qualitative Exploratory. Lexington, MA: Decision Research Corp.

²⁹ See Henry A. Giroux's "The Mouse that Roared: Disney and the End of Innocence". Giroux's interpretation of Disney as a corporate nation-state upholding a glossy set of middle class values to the world as model for social

interaction is powerful and resonates closely with the same type of philosophy at Chautauqua. Chautauqua embraces the same sanitized version of Ozzie and Harriet America that Disney so proudly displays to the world. It is not surprising that Eisner embraced and exploited the Chautauqua ideal. <http://www.disneyinstitute.com>

³⁰ http://www.disneyinstitute.com/Topics/Core_Topics.aspx

³¹ This title of the ceremony and President's speech given at the opening and closing of the summer season.

³² I would estimate that the African-American population represents less than one percent of the Chautauqua constituency at the time of my study.

³³ I interviewed the Student Venture staff after this event and they stated they "were totally ignorant" of the meaning of the word Gestapo. It is up for grabs on whether they were being forthright or not.

³⁴ <http://www.ciweb.org/chautauqua-abrahamic>

³⁵ <http://www.jewishcenterchautauqua.org/>

³⁶ Andrew Rieser's *The Chautauqua Moment: Protestants, Progressives, and the Culture of Modern Liberalism* is a landmark social historical study of the Chautauqua Movement. While there are numerous articles on the Movement and a host of dissertations and theses; the latter remain for the most part unpublished. Rieser notes the while nonacademics tend to know about Chautauqua, his queries among academics "produced quizzical stares" (2003: 1). Theodore Morrison's *Chautauqua: A Center for Education, Religion, and the Arts in America* (1974); Alfred Irwin's *Three Taps of the Gavel: Pledge to the Future The Chautauqua Story* and of late the touristic *Chautauqua: An American Utopia* by Jeffrey Simpson were the three informative texts on the Institution and the movement it spawned. The latter three being written for general audiences, Rieser's text is a welcome start to a hopefully long run of academic works.

³⁷ Library of Congress: Religious Camp Meeting: Watercolor by J. Maze Burbank, c. 1839. Old Dartmouth Historical Society-New Bedford Whaling Museum, New Bedford, Massachusetts. Gift of William F. Havemeyer (187) <http://www.loc.gov/exhibits/religion/rel07.html>

³⁸ A quick reference: http://www.crookedlakereview.com/articles/136_167/137fall2005/137martin.html

³⁹ Library of Congress: *Lorenzo Dow and the Jerking Exercise*. Engraving by Lossing-Barrett, from Samuel G. Goodrich, *Recollections of a Lifetime*. Copyprint. New York: 1856 General Collections, Library of Congress (195) <http://www.loc.gov/exhibits/religion/rel07.html>

⁴⁰ Library of Congress: Religious Camp Meeting: Watercolor by J. Maze Burbank, c. 1839. Old Dartmouth Historical Society-New Bedford Whaling Museum, New Bedford, Massachusetts. Gift of William F. Havemeyer (187) <http://www.loc.gov/exhibits/religion/rel07.html>

⁴¹ Library of Congress: *Family handing out tracts* Woodcut by Anderson from *The American Tract Magazine*, August 1825. American Tract Society, Garland, Texas (205)

⁴² The gate fee in 1996 was \$815 for an advanced Season Ticket, \$900 if purchased between March 1 and June 17, and \$1670 after June 17. They can be purchased in increments of weeks \$190, weekends, days \$36.00, or by the hour. The administration has pledged that the gate fee will only raise with the rate of inflation. The gate offsets roughly one-third of the Institution's annual costs.

⁴³ Primary access to the Institution was by steamboat coming up Chautauqua Lake from Jamestown about 17 miles down lake and from which the closest rail line had a station.

⁴⁴ While contemplating a full history of the philanthropy from 1874 on, I studied in the archive at Smith Memorial Library located on the Institution's grounds. There during the winter of 1993-94 I studied and copied the available Presidents reports, Reports of the Secretary and Superintendent, and Reports of the Board of Trustee meetings from the following years: 1889, 1890, 1891, 1893, 1894, 1895, 1898, 1899, 1900, 1901, 1902, 1903, 1904, 1905, 1906, 1907, 1909, 1910, 1912, 1913, 1914, 1915, 1916, 1917, 1918, 1919, 1920, 1921, 1922.

⁴⁵ A receiver is one placed in the custodial responsibility for the property of others, including tangible and intangible assets and rights (Philip & Kaminski, 2007:1).

⁴⁶ The Foundation in 2010 had holdings of over \$60 Million: <http://www.chautauquafoundation.org/>

⁴⁷ Foundation gifts come in a variety of forms: bequests, gifts of real property, cash, life insurance, stock, buildings and more. Two types of giving important to this discussion are restricted and unrestricted gifts. The income from unrestricted gifts such as this Hazlett Gift can be used in any way the Institution sees fit. The income from restricted endowment gifts have a description attached that determines exactly how that income will be used. For example, a donor may set up a restricted gift to fund a chair in the symphony or a scholarship in the art school. Many of these restricted gifts have out-clauses. Should funds for a specified program or person not be needed in a particular year, the funds may be returned to the fund's capital amount, or used for another area either deemed fit by the Institution or as spelled out in the description. Currently restricted funds have a clause built into them that allows for changes

to be made should the gift's intentions no longer be practical, e.g. if the restricted fund is for the dance school and the dance school shuts its doors, those funds will go into a general unrestricted fund.

⁴⁸ See Chapter 5 on Miller that describes the revitalization of the Institution from his point of view.

⁴⁹ From the cover of the Chautauqua Challenge Campaign booklet: 1993b

⁵⁰ Chautauqua Challenge Campaign booklet 1993b: 11.

⁵¹ Jon Van Til is Professor Emeritus of Urban Studies and Community Planning at Rutgers University, Camden. Van Til is the past director of the Pennsylvania Law and Justice Institute (1972-1974), and served as Editor-in-Chief of Nonprofit and Voluntary Sector Quarterly from 1978 through 1992.

⁵² 2010 Annual Report of the Chautauqua Foundation.

⁵³ The Institution does apply for and receive grant funds from the National Endowment for the Art and the National Endowment for the Humanities among other grants.

⁵⁴ The "Design for the Decade" document in its entirety is in Appendix A.

⁵⁵ A flexible fund is a restricted fund in that it is specified to support certain things based on specific criteria that the donor designated in the endowment agreement. For instance a donor could stipulate that the fund support lecture one year and the religion department the next. There are as many possibilities for examples of different flex funds as there are donors to fund them. From Timothy Growley, Director of Research, Chautauqua Foundation.

⁵⁶ Funding for planning and implementation for the Development Office is provided by gate and service income, endowment funds from the foundation and funds from the annual Chautauqua Fund.

⁵⁷ Appendix B contains scans of a blank data collection sheet used by the Development Office.

⁵⁸ An "ask" is the actual request made of the donor by a campaign volunteer or administrator.

⁵⁹ This particular gift was from a Pittsburgh industrialist who hadn't been to Chautauqua since he was 18 year old. He said that he had learned all the values and ethics at Chautauqua that he had come to cherish throughout his life.

⁶⁰ Personal communication from Timothy Growley, Director of Research, Chautauqua Foundation, Inc.

⁶¹ A list of the resources consulted in prospect research are as follows: American Prospect Research Association <http://www.aprahome.org/>; Broad Street; Whose Who in the East; Who's Wealthy in America; National Data Book; The Foundation Directories; Whose Who in America; People Property Prospects; Standard and Poor's register; indexes, corporations, directors, executives; Corporate Giving Directory; Guide to Private Fortunes; Whose Who in Finance and Industry

⁶² The Bestor Society, named after Arthur Bestor long time Institution President (Bestor Plaza), is a recognition organization set up by donor level: Benefactor Club \$25,000 and up; Patron Club \$10,000 to \$24,999; Sponsor Club \$5,000 to \$9,999; Tower Club \$2,500 to \$4,999; President's Club \$1,000-\$2,499; Assembly Club \$500 to \$999; Founders Club \$125 to \$499; Friend's Club \$1 to \$124. All well-planned annual funds and campaigns have such a strategy. The Bestor Society list is printed in the quarterly Chautauquan and in the Daily shortly after Old First Night.

⁶³ Appendix C contains a copy of the letter I received for my \$5.00 contribution to the Chautauqua Fund.

⁶⁴ Chautauqua Foundation Inc. Annual Report for the Fiscal Year Ended June 30, 1994: 10-11.

⁶⁵ In 2011 the Foundation has \$64,072,188 in total assets. 2011 Chautauqua Foundation Annual Report.

⁶⁶ The area is called the "Gold Coast". A strip along Chautauqua Lake developed in the 1950's, populated with rather modern homes with relatively large yards in comparison to the cramped and crowded "Historic District". It was built during a period in Chautauqua's history when many believed its heyday was over and it would remain a quiet community on the lake. The area now has had nearly every square foot of excess space put to use and all homes conform to the Institution's building codes. Homes have been built on lots small enough to contain an average garage.

⁶⁷ Mina Miller Edison, wife of Thomas Edison (his second wife) was a regular visitor to the Institution. There are many myths/stories surrounding Edison. He wired the Athenaeum making it the first electrified hotel in the world. When I walk with friends on the verandah, I always point out the window he used to escape from when prying Chautauquans would interfere with his breakfast. The Miller Cottage is one the more prominent Chautauqua landmarks. An architectural wonder in its own right, it serves as a symbol of the type of individuals the Institution boasts as their own. There is a prominent photograph of Edison sitting with Henry Ford in the back yard.

⁶⁸ The Gebbie Foundation, <http://www.gebbie.org> at the direction of its founders, keeps the Institution as a priority for its funding.

⁶⁹ These initiatives have been implemented at the Institution.

⁷⁰ According to this definition, Chapter 5 on Richard Miller is a breach story.

⁷¹ David McCullough (b. 1933) author, narrator, historian, and lecturer; McCullough is a two-time winner of the Pulitzer Prize and the National Book Award and a recipient of the Presidential Medal of Freedom.

⁷² The full text of the speech is in the Appendix D.

⁷³ This is also an excellent example of the difference between a primary and secondary levels of a speech genre. The “Welcome home” in the primary usage is straightforward and explicit; in this instance of secondary usage, it is loaded with meaning as the word ‘Home’ for Chautauqua carries many of the thematic ideology listed above.

⁷⁴ Becker is currently the Institution’s President.

⁷⁵ Note the genre style, he sounds as if he’s reading from one of the pieces of campaign literature he wrote or edited.

⁷⁶ In the conclusion I relate a personal account of the Becker interviews. His ability to persuade by use of common sense and his own integrity is powerful salesmanship.

⁷⁷ The complete letter is in the Appendix E.

⁷⁸ Bradford for all intents is now a ghost town, one of the poorest in NW Pennsylvania.

⁷⁹ The Bromeley letter is included in its entirety in the Appendix F.

⁸⁰ I used a random name generator that takes U.S. Census data to make first and last name pairs to create pseudonyms for my informants. <http://www.kleimo.com/random/name.cfm>.

⁸¹ Adults and teens will do adult and teen things. This is a robust group of people who were known, no alcohol policy at the time be damned, for some pretty wild events on many scales.

⁸² From what I could gather, the Institution screened new property owners with this approval process. Details were vague and no one was comfortable enough talking about it to give me any real insight. Speculation would seem to link it to the old country club process of discriminating against ‘others’ through membership requirements. A quick insight from one old-time property owner who had the audacity to say on the record that “when the first Jew bought property on the grounds, this place started going downhill”.

⁸³ <http://www.jewishcenterchautauqua.org/>

⁸⁴ In the spring of 2011, the Public Broadcasting Service aired “Chautauqua: An American Narrative”. It provided one of the best overviews of Chautauqua to date, but of interest was the documentary’s focus on an African-American family as a traditional Chautauquan family. This is simply not true demographically, but perhaps the focus represents an effort on Chautauqua’s part to socially *engineer* the discourse on race and thus invite African-Americans to the grounds through this video. <http://www.pbs.org/wned/chautauqua-american-narrative/>

⁸⁵ See Chautauquans for a reform of the ARB architectural requirements: <http://reformchautauquaarb.com/>

⁸⁶ A copy of the planning document is in Appendix A.

⁸⁷ Chapter titles for the “The Chautauqua Challenge Campaign Volunteer Handbook”: Job Description, Campaign Organization, Campaign Time Table, Key Facts about Chautauqua, The Planning Process, Campaign Objectives, Preparing for the Call, Frequently Asked Questions, Ways to Give, The Solicitation Sequence, Campaign Pledge Form, Recognition and Naming Opportunities, Volunteer Management System; and an appendix with a copy of the Design for the Decade.

⁸⁸ Meaning he was the first in his family to visit Chautauqua. Some families at the time of the study had eight generations on the grounds.

⁸⁹ From her talk at SUNY Oswego spring 1983.

⁹⁰ In 2000 I had the privilege of working directly with Dan. He had retired from Chautauqua and was asked to be the first Executive Director of the Robert H. Jackson Center in Jamestown, NY. Jackson rose through the FDR administration to become a U.S. Supreme Court Justice and the Chief Prosecutor of the Nazi leadership at Nuremberg. I was hired as grant writer and ended up as Dan’s assistant. Tragically, he was struck with pancreatic cancer and died six months later. At his funeral, thousands in attendance, there wasn’t a dry eye in the place.

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Appendix A

A DESIGN FOR THE DECADE OF THE CHAUTAUQUA INSTITUTION

Throughout the 1980s the board of trustees of the Chautauqua Institution set in motion and accomplished a number of important initiatives. Those initiatives helped to establish certain conditions that prevailed as the board and staff began to plan initiatives for the '90s.

Attendance remained steady, and the public was highly supportive of the mix and quality of programs. The **overall Financial condition** of the Institution was sound. The **leadership** of the Chautauqua Foundation, the board of trustees, and the management and artistic staff of the Institution remained either stable or in a state of smooth transition. A new structural relationship between the Chautauqua Institution and the Chautauqua Foundation increased the potential for the development of philanthropic resources. **Buildings and grounds** were in good condition, and many private owners had made significant investments in their properties. An established **planning process** encouraged leadership to look farther ahead, and the beginning of the last decade of the century invited ambitious reflection on the year 2000 at Chautauqua.

Adhering to the Chautauqua Challenge and reviewing those favorable current conditions, the board established specific goals for the decade ahead:

- I. Maintain and strengthen the current mix of programming, assuring both vitality and excellence;
- II. Preserve, restore and maintain existing facilities and plan and complete others as needed;
- III. Accomplish planned growth in Chautauqua's attendance;
- IV. Acquire and develop land to meet goals of program, facilities, finance and attendance growth;
- V. Maximize planning for ongoing philanthropic support through annual giving, endowment growth, and special projects; and
- VI. Using historical and current information, appropriate planning processes, and effective governance, manage Chautauqua within planned resources.

The board of trustees believes that the accomplishment of those goals will guarantee that the Chautauqua Institution can continue the mission expressed in the Chautauqua Challenge well into the 21st century.

The integrated plan by which these goals will be accomplished, entitled The Design for the Decade, was approved on May 4, 1991, by the board of trustees. What follows is the original document approved at that meeting with one significant change: certain financial models that were used as planning tools have been replaced by a narrative section on financial resources.

The Design for the Decade is presented in six sections, titled:

- Program Development
- Facilities
- Marketing

Land Use and Development
Financial Resources
Management and Administration.

In each section, projects and processes are presented in brief summaries, so that the reader can move with dispatch through all that is planned and see the integrated whole.

The Design for the Decade does not attempt to address every activity, facility, or program at Chautauqua, leaving such specific planning and implementation to the Institution's ongoing long-range planning process. It should also be noted that, as a planning document, the Design for the Decade outlines projects and processes that have changed and will continue to change as circumstances change and plans are tested against reality.

In presenting The Design for the Decade to the public, the board and staff have promised full and focussed commitment to the funding and implementation of the plans specified in this design. We also pledge Um we will report publicly on progress or revisions as often and as completely as prudent and possible.

The rationale for our focussed commitment to this plan and for sharing it with you is no less than the opportunity to prepare Chautauqua for the 21st century with quality and strength.

PROGRAM DEVELOPMENT

The Lecture Platform. No element of Chautauqua's program contributes to the visibility of the Institution more than its historic lecture platform. In recent years it has assumed increasing significance primarily through its international dimensions, the Chautauqua conference format and the considerable focus on public affairs. In the decade ahead, an important purpose of the lecture platform will be to continue to prepare Chautauquans to participate in a more complex and interconnected world. The lecture platform will retain those elements and themes which have strengthened it in the past - arts and humanities, business, science, and education, for example. As part of the 1991-1993 theme of "Chautauqua and the Human Family," a delegation of Latin American citizens and students will attend the 1991 Conference on the Americas. Other major themes will be planned in multi-year sequences following "Chautauqua and the Human Family." Those themes will be determined at least one year before the next sequence starts. Chautauqua conferences will continue to define one or two weeks, and speakers from foreign countries as well as citizen exchanges will continue to lend an international emphasis. Lecture platform themes will also be expressed in other parts of Chautauqua's program, such as in Department of Religion lectures, Chautauqua Symphony Orchestra guest artists from other countries, or students from around the world. This preeminent lecture platform will require more competitive fees for speakers, the ability to bring speakers from around the world, and an expanded network of individuals, organizations and agencies with whom we collaborate, all of which will require increased financial resources. Increased endowment and special funding are required to meet this need for resources.

The Chautauqua Symphony Orchestra (CSO) determines much of the character and schedule of our performing arts. Repertoire will continue to be diverse and adventuresome, guest conductors and soloists will be selected from an outstanding international roster, children's concerts will be added, and in 1992 the concert season will be extended into the first or ninth week of the season. Resources will be secured by 1993 to expand the size of the orchestra as required by repertoire. Rehearsal requirements of the CSO, as they have been articulated both by

the music director and by other symphony leadership, and the overall needs of the music program call for a satisfactory facility for full orchestra rehearsals, recitals and chamber concerts by 1995. (See the FACILITIES section for further discussion of this building.)

The Department of Religion begins the decade with new leadership and a plan for important contributions to the life of Chautauqua. Specific objectives are to enhance worship and lecture programs (both the Hall of Philosophy series and lectures in the Amphitheater and elsewhere) and provide high quality choral and liturgical music. The department will also foster religious education on the grounds, design and implement continuing education programs for the nation's pastorate, and extend Chautauqua's influence through national and international study seminars. The creation of a Religion Initiatives Fund in the Chautauqua Foundation will permit the department to carry out that ambitious agenda and sustain its impact on life at Chautauqua.

The Chautauqua Opera Company will present four productions in English following the principles established in the five-year plan adopted by the board of trustees. Other provisions of that plan include apprentice concerts with the CSO, the apprentice one-act double bill, studio artists' concerts, a children's opera and community outreach, cabaret evenings at the College Club, and opera in concert with the CSO. Special design projects will be developed with scenic and graphic design departments of collaborating colleges or universities. The opera company season will also add world premieres and presentations of new works under special funding from 1992 to 1994.

Under a three-year plan approved by the trustees in 1988, **the Chautauqua Theater Conservatory and Theater Company** have provided quality performances in Normal Hall for full houses. During that same time, professional consultants have provided information about Normal Hall, Norton Hall, and a new theater facility. In May 1991 the board of trustees will receive recommendations from the staff and the Program Committee and reach decisions about the future dimensions of the theater program and its facilities.

Dance at Chautauqua began a new chapter in 1990 with the creation of **the Chautauqua Dance Company**, young professionals who rehearse and perform with the talented students of the School of Dance. Increased funding for costumes, lighting, sound systems and administration continue this growth in 1991. In 1992, an increased program budget will permit the re-introduction of star professional soloists for Amphitheater performances with the Chautauqua Dance Company.

Youth Programming. Recent experience points to an increasing number of youngsters on the grounds in the '90s. Present programs are generally safe, sound, attractive and running at or near capacity. (See **Youth Facilities**, below.) Improved salaries will aid in the recruitment, housing, and retention of qualified leadership staff. Existing programs such as the Family Entertainment Series and recent programs for youth from the opera and theater companies will continue, and be expanded. The CSO will add children's concerts. These and other ideas will draw on the diverse resources of Chautauqua's program to enhance activities for youth. The development of a Youth Programming Fund in the Chautauqua Foundation will support these improvements in programs and staff development.

The **schools of fine and performing arts** have developed five-year plans to meet guidelines established by the board in 1988. In addition to public performances, each school will provide opportunities for open enrollment, public lectures, demonstrations, exhibits and other exchanges with the broader Chautauqua audience.

The recruitment and retention of highly qualified faculty will require increasing financial support both to improve our competitive position with other summer employers and to provide

adequate housing in a steadily more expensive private market Faculty salary issues are present in all the schools. Endowed faculty chairs will help address this need for resources. In all schools, increased scholarship endowments will permit Chautauqua to expand its assistance to talented and needy students.

When the board of trustees approved recommendations from its task force on extended programming in February 1988, it set in motion planning that will lead to specific projects in the 1990s. Some expanded off-season programs will build on the models offered at Chautauqua by the 55-Plus Program. Lectures, seminars and sermons will be developed at off-grounds sites. The Institution will continue to participate fully with the network of other Chautauquas, which are a living part of the history of the Chautauqua movement Chautauqua will also cooperate with new projects that seek to further the ideas and values inherent in our mission. Embellishing on the goal of the lecture platform to achieve a more informed citizenry and connecting that goal to the theme of Chautauqua and the Human Family in 1991-1993, a major international extended program will be developed. Chautauqua affirms its mission as a national and international resource in thus extending its programs outside its gates and its summer season, but it also strengthens its mainstream program when it carries out an extended program.

With the establishment of a plan for its **archives**, Chautauqua will protect vital records of the past and accurate information about the present Proper equipment and facilities are among the highest priorities. A major study of the Smith Library's layout and function in 1991 will lead to specific plans for climate-controlled storage for the archives. (Refer to FACILITIES section.) New responsibilities assigned to staff, improved processes for the management of current records, the training of volunteers and greater public awareness will also advance the archives.

FACILITIES

Chautauqua's facilities needs through the 1990s include special projects and the normal, ongoing restoration, preservation and maintenance of all of its buildings, grounds, and equipment

Amphitheater. The needs of this central performance space must lead any list of special projects for the decade. More than \$900,000 of work has been identified through 1999 to assure that the Amphitheater will be structurally sound, safe, visually attractive and well-equipped into the 21st century. That amount of work, however, is clearly beyond the funding that the annual capital budget can provide and, at present there is no endowment for that facility. The creation of an endowment of \$1 million for maintenance of the Amphitheater and special projects of approximately \$230,000 will significantly reduce but not remove the need for annual capital budget expenditures.

The Massey Organ is one of three existing pipe organs in the world installed in an "outdoor" environment Expert analysis has projected a cost of \$100,000 to repair the floor and beams that support this 40-ton instrument. Another \$500,000 will restore or replace elements of the winding system, the windchests, and the pipes that create the historic and cherished sound of the instrument An endowment of \$100,000 in the Chautauqua Foundation will guarantee the funds for future maintenance. Thus, the commitment of the trustees to preserve this historic instrument will require a total of \$700,000 in special projects and endowment.

Orchestra Recital/Rehearsal hall As mentioned in the PROGRAM section under **the Chautauqua Symphony Orchestra**, the music director and other symphony leadership have noted the inadequacy of present rehearsal facilities and have made a persuasive case for a facility

that could be used for orchestra rehearsals and for recitals, chamber concerts and masterclasses. The facility would apparently need to be approximately twice the size of McKnight Hall. The importance of the orchestra to our program requires timely attention to this facility. Decisions about renovation of existing structures or construction of a new building will be reached in 1991, and a new facility will be provided.

Restoration and enhancement of the **waterfront**, as detailed in the 1989 Waterfront Plan, calls for important facilities projects. Major elements include restoration of the seawall, construction of a restroom and shower facility at University Beach, generally improved landscaping, and the planning and construction of a facility at the south end of the grounds that could include a gas dock, service office, marina and space for youth and recreation related activities. Further analysis of the scale of these projects will occur in 1991 and 1992, but it is clear that some mix of capital budget expenditures, capital reserve funds and, possibly, philanthropic support will be required to accomplish the major projects in that list.

Golf Course Expansion. The Chautauqua Golf Club is one of the most heavily used recreational facilities of the Institution. The board of governors of the golf club has requested that the Institution's board of trustees approve expansion of the present 27-hole course by another nine holes. Those holes were designed on the master plan of the Whallon Farm in the early 1980s, and authorization to clear some of the area needed was granted in October 1990. At its February 1991 meeting, the board of trustees received and approved recommendations to proceed with the building of the fourth nine holes consistent with the financial projections already provided.

Beautification of the Highway Perimeter. Using ideas incorporated in a landscape architect's study done in 1989, staff has produced a plan for the beautification of Chautauqua's highway corridor. Major elements include plantings to soften existing fence lines and the relocation of maintenance facilities to other Institution property. Landscaping will be accomplished through the capital budget. The cost of demolition of existing buildings and construction of new buildings is estimated in the range of \$500,000. That amount will require sources of funds beyond the annual capital budget. Issues of ingress and egress will also be reviewed and plans developed in 1992.

Youth Facilities. As mentioned under **Youth Programs**, many of the youth activities are operating at or near capacity. Boys' and Girls' Club buildings, the Youth Activities Center and the College Club are adequate for the present and foreseeable future. Increased resources will be assigned to make outdoor play spaces both safer and more usable. At the Children's School, however, enrollment has risen in recent years, with the average for the past five years reaching 506 compared to an average of 459 for the prior four years. These numbers have meant that on some days the capacity of the facilities has been reached.

In 1991 there will be further review, and decisions will be reached responding to the issues of overcrowding and preliminary estimates of the costs of renovations at the Children's School.

Faculty and Staff Housing. A 1990 task force of the board has submitted a report substantiating the need for housing for seasonal faculty and staff. The issues of meeting this need are complex, and discussion will continue, leading to decisions by the end of 1991. Smith Memorial Library - Chautauqua Archives. In 1991 decisions will be reached concerning the best uses of the different areas of the library, including the proper storage of archival materials. A significant investment, perhaps as high as \$250,000, may be required to provide zoned climate-controlled space throughout the library. After the cost is more accurately understood a funding strategy will be identified, but special grants are a likely source.

Central Data Processing. A key element of improved information management will be continual evaluation and upgrading, as necessary, of the central data processing equipment in the Colonnade Building. The present mainframe computer is close to 95 percent of its designed capacity. A consultant will be retained in 1992 to advise staff on questions of central and independent data processing, and decisions will be reached that year. Costs cannot be projected until that study is complete, but the logical next level for central data processing will cost \$150,000, with the capital budget as the likely source.

General Facilities Inventory. Over the next ten years protection and enhancement of the buildings, grounds and infrastructure that make up Chautauqua's capital inventory will require approximately \$4.2 million beyond the projects described so far in the FACILITIES section. That total excludes expenditures covered by endowments for the maintenance of buildings, and it focuses on the needs of buildings, with very little allowed for purchasing equipment. Using the groupings of buildings in the Institution's capital budget, the work projected is as follows:

Community Buildings - \$2,063,500

Cultural Buildings - \$374,000

Educational Facilities - \$474,000

Student, Staff, and Faculty Housing - \$421,600

Youth Activities/Recreation - \$352,000

Operations Facilities and Vehicles - \$521,000

Current thinking is that annual capital budgets might address roughly one half of the \$4.2 million. The other half will be funded by a mix of new endowments, special capital projects and capital reserve funds.

MARKETING

The board of trustees has determined that we will plan for growth in attendance at a rate commensurate with existing facilities and support services (or with a reasonable extension of those) and which is compatible with the essential ambience and mission of Chautauqua.

Chautauqua's marketing program will address three distinct constituent categories: 1) property owners; 2) resident visitors (those who spend a night or more in accommodations on the grounds); and 3) day visitors (those who buy a day, day/evening or evening ticket). All three categories are of great importance to the future of the Institution. In general, Chautauqua will work to see that all three categories are well served and feel welcome, that all categories are invited to return for successive visits, and that new visitors are encouraged to become resident, repeat visitors.

The priorities will be as follows:

- 1) Continue to develop our current clientele base by:
 - a) Encouraging Chautauquans to come successive seasons;
 - b) Encouraging Chautauquans to increase their lengths of stay;
 - c) Helping Chautauquans to feel a part of the community and commit themselves to the overall support of the Institution.
- 2) Maximize property-owner, resident-visitor and day-visitor attendance at programs where seats are available. Targets will be symphony, dance, opera, lecture platform and religion

- programs.
- 3) Develop new audience bases specifically targeting:
 - a) Resident visitors
 - b) Families
 - 4) Continue to identify our constituents and resources in an effort to determine expectations and needs.

A Chautauquan is anyone who has attended Chautauqua.

LAND USE AND DEVELOPMENT

The opportunities of the next decade require wise use and acquisition of land, and willingness to expand the numbers of people attending Chautauqua through the careful development of some property. Land development will help to increase the numbers of people attending programs and will provide resources for programmatic and capital needs. As land development is considered, however, full analysis will be given to the impact of growth on programs and facilities that are now at or near capacity, such as the Children's School, Boys' and Girls' Club, waterfront facilities or tennis courts. Careful study of the impact of any development on the environment and the Institution's commitment to protection and addition of trees will also be included. No further Institution-owned land inside the existing fence will be developed for expanded housing. Chautauqua will remain alert for opportunities to acquire land contiguous to existing property lines on both sides of Route 394. Two specific projects will proceed.

Elm Lane Properties. Subject to the process now underway, recently acquired land on either side of Elm Lane will be developed starting in 1991. Careful planning will establish environmental, historic preservation and "good-neighbor" policy as this valuable property is developed for sale. A master plan will be drawn for land on both sides of Elm Lane and presented to the board in May 1991.

Whallon Farm. A schedule has been set by which some fact finding and initial decisions will be reached regarding future plans for the Whallon Farm by the November 1991 meeting of the board. Three assumptions underlie even this initial process: 1) that the Whallon Farm, if developed, will probably not be developed as an "on-grounds" component of the Institution; 2) notwithstanding #1, the Whallon Farm will be developed as a means to expand the numbers of people involved in, committed to and supportive of the Institution; and 3) the financial return will be used to help achieve the results of the Design for the Decade. Full consideration of the options during 1991 will lead to decisions about which option to select.

FINANCIAL RESOURCES

The foregoing plans to maintain and strengthen the current mix of programming and to preserve, restore and maintain facilities are already seen to require planned growth in attendance, the wise development of land and a commitment to further fund raising. Part of the planning needed to accomplish, full integration and implementation of those major efforts is the analysis, projection and management of Chautauqua's financial resources through the first half of the decade. Two different analyses shed light on those resources.

Financial Study # 1: Operating Income and Expense

The first analysis is a financial model through 1994 of Chautauqua's operating income and expense. That model is updated each year as a tool by which staff and board can study short-term (three-year) problems and opportunities in Chautauqua's budgets. The model also becomes a part of each year's revision of the long-range plan. Some of the primary assumptions that guide the first financial model are:

- including both the effects of inflation and the planned extraordinary costs of some projects in the Design for the Decade, overall expenditures will grow at an annual rate slightly higher than the rate of inflation of the national economy;
- gate ticket prices will grow by 3% or less
- long term ticket sales will grow by 3% or less
- endowment income will increase faster than either earned income or total annual gifts to the Chautauqua Fund
- Chautauqua will run balanced budgets and will adapt its models each year to accomplish that goal through its standard budgeting process

Applying those assumptions to the balanced budgets of the late 1980s, this modeling process projects modest gaps between operating income and operating expenses, but the staff and board believe that normal budgeting and management processes can respond to those gaps. Annual updates of the model will help identify areas in which the staff and board will have to focus in both budgeting and management

Financial Study #2: Resource Allocation

A second study looks at a larger picture: the resources needed to fund not only the annual operating expenses but all of the capital, endowment, operating and developmental needs of the Design for the Decade. This study also analyzes and projects the resources that can be brought to bear through 1995. Conclusions reached in this analysis include:

- Chautauqua's annual capital depreciation budget will be expected to supply approximately \$2.5 million in the next decade toward the annual maintenance, restoration and preservation of facilities;
- \$3.6 million in capital funds from sale or development of property will be required to improve facilities;
- \$1 million from sale or development of property is earmarked for unrestricted endowment;
- annual giving to the Chautauqua Fund, targeted growth in both restricted and unrestricted funds in the Chautauqua Foundation, and special programmatic and facilities projects will create a total philanthropic challenge of more than \$20 million through 1995.

The sequence by which these various resources can be provided and the mix of resources determined appropriate for each project or program will determine certain priorities. Projects that await new endowment may wait longer than projects dependent on the annual capital budget or near-term land development, for example. Some projects have already been said to be entirely dependent on the availability of special funding. Financial realities will determine scheduling

and the degree to which a project can be accomplished at any given time.

MANAGEMENT AND ADMINISTRATION

The full and successful achievement of the Design for the Decade will require vision, energy and financial support from the numbers of people who attend and support the Chautauqua Institution. It will also require careful management and administration of the complex entities that make up programs, facilities, finances and land resources at Chautauqua. Some of the major elements of careful and effective management will be:

1. A commitment to the continuing processes and discipline of long-range planning;
2. Careful stewardship of financial resources through the creation of clear financial policies and systematic budgeting and cost management;
3. Renewed energy in creating linkages with local, county, regional, state and federal government officials and agencies;
4. Thorough and timely communication with Chautauqua's diverse publics;
5. Regular and consistent collection and timely interpretation of important statistical information;
6. Regular evaluation of all programs; and
7. Systematic review of the structure and function of administrative staff and all governing boards.

These commitments will provide effective ongoing governance and administration of the Institution. The accomplishment of the potential of the Design for the Decade will also require the full and focused commitment of the board and staff to the funding and implementation of the plans specified in that design.

Appendix B

CONFIDENTIAL

1. NAME: _____
(Last) (First) (Initial) (Maiden)
2. DATE OF BIRTH (month, day, year): _____
3. PRIMARY RESIDENCE: Phone # _____
Street, Apt./Box# _____
City, State, Zip _____
4. CHAUTAUQUA RESIDENCE: Phone # _____
Address, Box #, Apt. No. _____
How long do you stay at Chautauqua: _____
5. OTHER RESIDENCE: Phone # _____
Address, Apt./Box # _____
City, State, Zip _____
6. BUSINESS/PROFESSIONAL EMPLOYMENT: (if retired, indicate last position)
Employer _____
Type of business _____ Title: _____
Address _____
Phone () _____
7. MARITAL STATUS: Married _____ Single _____ Widow(er) _____
8. SPOUSE'S NAME: _____
(First) (Middle) (Maiden)
Please indicate spouse's name and birth even if deceased.
9. SPOUSE'S DATE OF BIRTH: (month, day, year) _____
10. SPOUSE'S BUSINESS/PROFESSIONAL EMPLOYMENT: (last position if retired)
Employer _____
Type of Business _____ Title: _____
Address _____
Phone () _____
11. OCCUPATION SUMMARY (Previous Positions Held/Titles/Firms):
Self: _____
Spouse: _____
11. EDUCATION (College/University/Degrees):
Self: _____
Spouse: _____
12. CHILDREN (Name, Birth Date): GRANDCHILDREN: (Name, Birth Date):

13. ARE YOUR CHILDREN/GRANDCHILDREN ACTIVE AT CHAUTAUQUA (in what way):

14. The following information will be held in strictest confidence. It is used exclusively to profile various categories of Chautauquans, and for statistical purposes. (Optional)

ANNUAL INCOME: ___Below \$50,000 ___\$50,000-\$100,000 ___Over \$100,000

15. PLEASE LIST ANY INTERESTS/ORGANIZATIONS YOU OR YOUR SPOUSE ARE INVOLVED WITH OUTSIDE OF CHAUTAUQUA:

Self: _____

Spouse: _____

16. HOW LONG HAVE YOU AND YOUR SPOUSE BEEN COMING TO CHAUTAUQUA:

Self: _____

Spouse: _____

17. WHAT FIRST BROUGHT YOU TO CHAUTAUQUA (Parents/Friends/Program, etc.):

18. MAIN INTERESTS AT CHAUTAUQUA (Programs/Recreation/etc.):

Self: _____

Spouse: _____

19. WHAT ARE YOUR VIEWS ON CHAUTAUQUA TODAY (Programs/Atmosphere/etc.):

20. OTHER COMMENTS/CONCERNS/THOUGHTS OR MEMORIES YOU WOULD LIKE TO SHARE:

Appendix C

DEVELOPMENT OFFICE



August 4, 1993

Mr. Paul Benson
75 E. Chautauqua Street
Mayville, NY 14757

Dear Mr. Benson:

On behalf of Chautauqua Institution I am pleased to thank you for your recent contribution to the 1993 Chautauqua Fund. Your gift of \$5.00 was received by the Institution on August 4, 1993. Please retain this letter as your official receipt.

Your gift to the Chautauqua Fund, which is an important part of the Chautauqua Challenge Campaign, is genuinely appreciated. It is no accident that the Chautauqua Fund makes up one-third of the Chautauqua Challenge Campaign goal - the Fund is the life blood of the Institution. Your support, both financially and personally, is so important to us as we publicly announce the Chautauqua Challenge Campaign this year and look forward to its continuation in 1994 and 1995.

This special place has existed for almost 120 years because of the timelessness of our founders' visions and the committed generosity of those like you. The continuing work of the Institution is only possible because of the essential investments made by those who care about Chautauqua's future.

On behalf of the Institution, and indeed all Chautauquans, thank you.

Sincerely,

David G. Williams
David G. Williams
Director of The Chautauqua Fund

DGW/clv

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Appendix D

Dan Bratton

Three Taps of the Gavel

June 27, 1993

The Chautauqua Daily, June 28, 1993. Page 4.

Welcome home. Welcome home to Chautauqua.

What beautiful words these are to offer. What beautiful words these are to hear. Welcome home to Chautauqua.

"We gather together where durable values thrive, and arts are in the making; where a spiritual dimension informs our every activity; where the legacy of generations is passed on to our children through traditions of ritual and celebration; where the life of the mind is ever sparked and time is taken for quiet reflection; to all these gifts we must add our own."

What a beautiful statement. What a compelling statement. What an incredible place it describes.

Chautauqua my Chautauqua, your Chautauqua, our Chautauqua. Welcome home to Chautauqua.

The statement I just read appears in a publication either mailed to you or given to you this morning. It is a publication which announces a signature moment in the life of the Chautauqua Institution, the "Chautauqua Challenge Campaign." It is my pleasure this morning through these Three Taps of the Gavel to publicly announce this campaign, this Chautauqua Challenge Campaign.

The board of trustees of this institution in 1991 approved a full, comprehensive, integrated and very ambitious plan for the coming five years of Chautauqua, the years 1991-1995. It is the "Design for the Decade of the Chautauqua Institution."

It sets out a series of goals which, as achieved, would position this institution to enter a new century, seven years hence, with a level of strength and confidence it has not heretofore known. It calls for the strengthening of program the orchestra, opera company, lecture platform and Department of Religion. It calls for new responses in program and facilities to our children and our youth. It calls for attention to the natural environment of Chautauqua. It calls for a strengthening of its operating fiscal posture. It calls for a restoration and reconstruction of the Massey Organ. It calls for a new recital and rehearsal hall. A bold set of goals, optimistically yet realistically adopted by our Board with a strong and vital Chautauqua in mind.

In adopting this plan, I believe the board took the only appropriate route. What other posture can anyone take who knows this place and what it can be, and what it should be, and what it must be? You see, we are a part of one of the finest and noblest of experiments ever conceived and undertaken. John Vincent: "Self-improvement in all our faculties, for all of us, through all time. for the greatest good of all people--this is the Chautauqua idea, 'it divine idea, a democratic idea, a progressive idea, a millennial idea."

John Vincent's friend and colleague, Lewis Miller, put it in his words, which are as relevant to the 1990s as the 1870s: "We are in the midst of great problems and struggles the right of the people to deal with the commonly accepted national questions... Lovers of humanity must make common cause, must recognize the situation and raise themselves up to the magnitude of the occasion, and carry through to the brightness beyond. Chautauqua must perform her part."

Thus informed and inspired by our founders, the Chautauqua trustees adopted the Design

for the Decade and, thus informed by trustee action, the Chautauqua Foundation designed and implemented the Chautauqua Challenge Campaign the largest philanthropic campaign in the history of this institution \$22.5 million to be raised in support of the, Design for the Decade and of Chautauqua. Twenty-two and one-half million dollars to be raised between 1991 and 1995 \$7.1 million in the accumulated Chautauqua Fund campaigns for those five years, \$3.25 million for facilities new and restored and \$12.15 million for endowment. The Chautauqua Challenge Campaign, born out of opportunity instead of crisis, dedicated to the most faithful expression ever of our mission, our heritage and our possibilities.

For the past two years we've been taking and telling the story of the Chautauqua Challenge Campaign to some carefully identified people, asking them to make their response, to pledge their level of participation prior to this public, Announcement I make today. Our hope was that by this day, I could announce we had achieved half of our goal, or \$11.25 million. Well, we missed it. We underestimated the dedication and belief and faith of Chautauquans. So I can today, not only announce publicly the campaign, but that through the response of these good people we have reached not \$11.25 million, but \$14 million in gifts and pledges, sixty-two percent of our goal!

Throughout this 1993 season, we will be celebrating Chautauqua in ways not previously enjoyed. We will be celebrating component parts of Chautauqua as identified in the Design for the Decade and the Chautauqua Challenge Campaign. We will be celebrating, beginning this very morning, achievements already reached, and we will be celebrating opportunities yet before us. And we will be asking others, many others, to add their response to this historic effort.

Welcome home, my friends. Welcome home to exciting and vibrant Chautauqua.

Appendix E

Chautauqua Challenge Opening Letter

Engage in Chautauqua, and you become part of a community where people believe in something. You can feel it in the air from the moment you come through the gate. Ours is a special community which both challenges and comforts, questions and worships. Chautauqua is a place and a program, and it is also an intangible spirit—a collection of many human gifts, shared and spread out among us.

For nearly 120 years now, generations of Chautauquans have gathered, each to give and to receive. Every season we build anew a community dedicated to the exploration of values, the enlightenment of the mind, the celebration of the arts, the maturation of the spirit and the connection across generations and among friends.

At Chautauqua, a precious thread runs directly to us from the past. Chautauqua traditions and the creative programming that bring them to life offer each of us our own avenues for involvement, understanding, response and development – the historic values articulated in the Chautauqua Challenge.

Mary Francis Cram, the Daughter of former president Arthur Bestor, explains the Chautauqua experience this way: “My father used to talk about ‘the productive use of the margins of time,’ how education never stops. For us at Chautauqua, vacation time is not a freedom from work; it is a necessary part of a whole life. And we need a variety of things for our ‘margins’. I like the word cornucopia to describe this place – it suggests a spilling out, an overabundance. We needn’t and shouldn’t try to confine it all somehow. You learn to make choices at Chautauqua.”

In these pages we bear witness to the extraordinary power and breadth of the Chautauqua experience as articulated by Mary Frances Cram and others from the present and past, all of whom have made Chautauqua a lifelong choice and commitment.

At the same time, as the contemporary stewards of Chautauqua, we are being called upon to make another choice – to participate generously in the Chautauqua Challenge Campaign, a multi-year effort to raise \$22.5 million to build upon the strengths of the Institution.

Persons of both modest and considerable means have long felt that coming to Chautauqua was worth hard work and sacrifice during the rest of the year. As we invest our best selves to perpetuate the spirit that is Chautauqua, so we must extend ourselves financially to meet the Chautauqua Challenge, to preserve and secure this one-of-a-kind resource for the generations to come.

Please join us here in celebrating the Chautauqua spirit, and help us meet the challenge in which we all share.

Robert B. Osburn
Campaign Chairman

Daniel L. Bratton
President

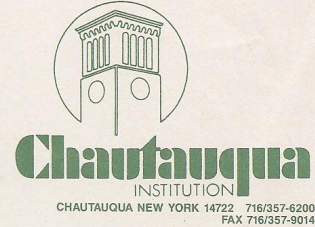
Thomas R. Bromeley
Chairman
Board of Trustees

[Chautauqua Challenge Campaign Brochure, 1993b: 1]

Appendix F

Tom Bromeley's Letter: November 1993

The Chautauqua Fund
an integral part of the Chautauqua
Challenge Campaign
1991 - 1995



November 1993

Mr. Paul Benson
75 East Chautauqua Street
Mayville, NY 14757

Dear Mr. Benson:

I ask your indulgence in letting me tell you a fable about "The Oil Producer and the Chautauquan."

I was raised in the heart of the Pennsylvania oil fields in Bradford, Pennsylvania.

When I was growing up, all night long you could hear the engines of standard drilling rigs, you could see their lights and you could hear the men dressing the bits.

At that time, Bradford had the highest per capita incidence of millionaires of any city in the U.S. There were more than a dozen Rolls Royces in Bradford--all were chauffeur driven.

People made their money primarily in three different ways.

1. The oil properties were held mostly in families. One hundred, 200, 500 acre oil leases operated by fathers and sons who actually produced the fields themselves.

Some of these people bundled up their properties and sold them to the major oil refineries...and they invested the money they got and lived from the return on that money.

2. Another group continued to produce; took the net proceeds of their oil production; invested that money and again lived from the return of those investments.

3. A third group took the difference between the market price of oil and its lifting cost and considered that to be their net profit, and they lived like people who had that magnitude of ongoing income...forever.

Their children had everything you could imagine; they bought new cars; they built grand new houses; they traveled. In general, they lived the good life.

All three groups I just described to you had very considerable wealth.

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The families in the first and second groups lived more modestly (relatively speaking) but their wealth, for the most part, has lasted more than one or two generations.

The families in the third group actually converted an asset from oil to cash; they liquidated a wasting asset and spent the proceeds--exactly analogous to a factory selling its machinery and spending the cash.

A great short run strategy, but disastrous in the long run.

So--when the lifting cost of oil exceeded its market price, the people in the first group cared not at all; the ones in the second group got no wealthier, but they did not lose the wealth they had.

The third group--the highest livers--suffered an abrupt cessation of their income and had nothing upon which they could fall back.

Probably 20 years ago, I met a friend of our family coming in the bank to make a \$125 payment on his automobile. He said, "Times change, don't they Tom? I remember when I used to go into the Cadillac agency every other year and buy a new car and pay for it with cash from my pocket." I remember it, too. Times do change.

That's the end of the fable of "The Oil Producer and the Chautauquan."

Interesting folklore about the oil industry, but what has it to do with Chautauqua?

Thirty or 40 years ago, Chautauqua was on the brink of bankruptcy. Its buildings were deteriorating; its income was not as great as its expense; it was going down the chute.

A massive infusion of capital by a generous foundation and a heroic rescue effort by a lot of dedicated Chautauquans saved the day, turned the tide, and primed the pump.

The priming took and the pump started to work again. Today, Chautauqua is well managed; it is financially sound; it has a comprehensive planning mechanism in place. Things are going well. But it has not always been thus and may not always be.

We now face the danger of people saying (or feeling) hey--everything's going well. Things are great just like they are.

Unfortunately, that statement is true.

So...why bother?

Now--if you will retrieve from your memory banks the fable I just told about the oil producer and the Chautauquan...

What I described to you took place slowly and insidiously over a long period of time. I'm 62 years old and I watched it happen for a good part of my life, and I watched it happen to my personal friends. It takes time...but it happens.

Neither you, nor I, nor we, created Chautauqua. We are living a legacy. It is the work and contributions and sacrifices of people over 119 years that we are reaping and that so enrich our lives this very day.

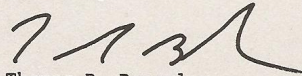
If we rest on our oars, we can drift for a short period of time; we can delay maintenance of the Amphitheater and the Children's School; we can bring in less excellent teachers and orchestra members; we can downsize the program.

But we would be doing so at the expense of consuming ourselves and our resources. And be very sure that we will be spending a wasting asset if we do not--every year--perceive the need, and communicate that need to others, to replace the assets that we are consuming, so that the legacy of the children of our grandchildren will not be an exhausted oil pool...but the beautiful and unique experience of Chautauqua.

It is because of your belief in Chautauqua that I am asking you to join the ranks of those who also know the importance of this place and understand the enjoyment and enrichment it has brought to so many. I hope this year you will participate in the history-making Chautauqua Challenge Campaign through your gift to the 1993 Chautauqua Fund. If you haven't been an annual contributor, now is the time to begin, and if you have contributed in the past, we hope that you will continue your giving in 1993 and perhaps consider an increase.

I personally thank you for your consideration and response to this request.

Sincerely,



Thomas R. Bromeley
Chairman of the Board

TRB/kt
enc.

P.S. I have enclosed a post-paid envelope for your convenience and look forward to seeing your name on the honor roll of Chautauqua supporters for 1993. If your gift and this letter have crossed in the mail, please accept both my apologies and my gratitude.